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Council Building
2 High Street
Perth
PH1 5PH

05/06/2024

A hybrid meeting of the **Finance and Resources Committee** will be held in the **Council Chamber** on **Wednesday, 12 June 2024** at **13:30**.

If you have any queries please contact Committee Services on (01738) 475000 or email Committee@pkc.gov.uk.

THOMAS GLEN
Chief Executive

Those attending the meeting are requested to ensure that all notifications are silent on their device and other devices are in silent mode.

Please note that the meeting will be broadcast online and recorded. The recording will be publicly available on the Council's website following the meeting.

Members:

Councillor Stewart Donaldson (Convener)
Councillor Grant Laing (Vice-Convener)
Bailie Chris Ahern
Bailie Alasdair Bailey
Councillor Peter Barrett
Councillor Andy Chan
Councillor Dave Cuthbert
Councillor Eric Drysdale
Councillor John Duff
Councillor David Illingworth
Provost Xander McDade
Councillor Tom McEwan
Depute Provost Andrew Parrott
Councillor John Rebbeck
Councillor Caroline Shiers
Councillor Colin Stewart

Finance and Resources Committee

Wednesday, 12 June 2024

AGENDA

MEMBERS ARE REMINDED OF THEIR OBLIGATION TO DECLARE ANY FINANCIAL OR NON-FINANCIAL INTEREST WHICH THEY MAY HAVE IN ANY ITEM ON THIS AGENDA IN ACCORDANCE WITH THE COUNCILLORS' CODE OF CONDUCT.

- 1 WELCOME AND APOLOGIES/SUBSTITUTES**
- 2 DECLARATIONS OF INTEREST**
- 3 MINUTE OF MEETING OF THE FINANCE AND RESOURCES COMMITTEE OF 24 APRIL 2024 FOR APPROVAL** **5 - 6**
(copy herewith)
- 4 OUTSTANDING BUSINESS STATEMENT** **7 - 8**
(copy herewith 24/179)
- 5 PEOPLE AND CULTURE STRATEGY 2024-2028** **9 - 44**
Report by Corporate Human Resources Manager (copy herewith 24/180)
- 6 PROCUREMENT UPDATE** **45 - 90**
Report by Strategic Lead - Legal and Governance (copy herewith 24/181)
- 7 PITLOCHRY ASSET REVIEW**
Report by Strategic Lead - Property Services (copy to follow)
- 8 AUTHORITY TO WRITE OFF DEBTS AND OBSOLETE STOCK** **91 - 112**
Report by Strategic Lead - Finance and Business Support (copy herewith 24/182)
- 9 MISSING SHARES PILOT - FEEDBACK AND RECOMMENDATIONS** **113 - 128**
Report by Strategic Lead - Housing and Communities (copy herewith 24/183)
- 10 PERTH WEST PROGRESS REPORT** **129 - 146**
Report by Strategic Lead - Economy, Development and Planning (copy herewith 24/184)

**11 REQUEST TO DRAW DOWN EARLY LEARNING AND
CHILDCARE RESERVE FOR SUPPORT IN PRIMARY 1**

147 - 156

Report by Strategic Lead - Education and Learning (copy herewith
24/185)

12 DISPOSAL OF MINIBUSES

Report by Strategic Lead - Environment and Infrastructure (copy to
follow)

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All Council Services can offer a telephone translation facility.

FINANCE AND RESOURCES COMMITTEE

Minute of hybrid meeting of the Finance and Resources Committee held in the Council Chamber, 2 Hight Street, Perth on Wednesday 24 April 2024 at 2.30pm.

Present: Councillors S Donaldson and G Laing, Bailie C Ahern and Bailie A Bailey, Provost X McDade, Depute Provost Parrott, and P Barrett, A Chan, D Cuthbert, E Drysdale, J Duff, D Illingworth, T McEwan, J Rebbeck, C Shiers and C Stewart.

In Attendance: T Glen, Chief Executive; C Mailer, Director (Strategy, People and Resources); A Williams, Director (Economy, Place and Learning); S Devlin, F Crofts, E Ritchie, S Coyle and J Ferguson (Economy, Place and Learning); L Simpson, S Walker, G Boland, S Crawford, C France, J Jennings, N Ballantine, A O'Brien, C Palmer, C Robertson, J Salisbury, K Molley, A Brown, M Pasternak and S Dockerill (Strategy, People and Resources)

Councillor S Donaldson, Convener, Presiding.

1. WELCOME AND APOLOGIES

The Convener welcomed all those present to the meeting.

2. DECLARATIONS OF INTEREST

There were no declarations made in terms of the Councillors' Code of Conduct.

3. MINUTE OF PREVIOUS MEETING

The minute of meeting of the Finance and Resources Committee of 31 January was submitted and approved as a correct record.

4. OUTSTANDING BUSINESS STATEMENT

Resolved:

The status of action in the Outstanding Business Statement (24/38) be noted and completed actions removed accordingly.

5. REVENUE BUDGET 2023/24 – UPDATE NO. 4

There was submitted a report by Strategic Lead – Finance & Business Support (24/130) providing an update on progress with the 2023/24 General Fund Revenue Budget based upon the January 2024 ledger, updated for any subsequent known material movements; and the projected financial position of the Housing Revenue Account.

Resolved:

- (i) The contents of the Report 24/130, be noted.
- (ii) The projected outturn for General Fund Services, set out in Section 5 and Appendix 1 and 2 of Report 24/130, be noted.
- (iii) The projected outturn for Corporate Budgets and Perth and Kinross Integration Joint Board, set out in Section 6 of Report 24/130, be noted.
- (iv) The funding update provided in Section 7 of Report 24/130, be noted.

- (v) The projected outturn for the Housing Revenue Account, which is summarised in Section 8 and Appendix 4 of Report 24/130, be noted.
- (vi) The adjustments to the 2023/24 Management Revenue Budget, detailed in Sections 8, 9, 10 & 11 and Appendices 1, 2, 4, 5, 6 and 7 of Report 24/130, be approved.
- (vii) The financial risks, set out in Section 12 and Appendix 8 of Report 24/130, be noted.
- (viii) The adjustments to the 2024/25 Management Revenue Budget detailed in Section 13 and Appendix 9 of Report 24/130, be approved.

6. COMPOSITE CAPITAL BUDGET 2023/28 & HOUSING INVESTMENT PROGRAMME 2023/28 – MONITORING REPORT No.4

There was submitted a report by Strategic Lead – Finance and Business Support (24131) (1) providing a summary position to date for the 5-year Composite Capital Budget and the 5-year Housing Investment Programme for 2023/24 to 2027/28; and (2) seeking approval for adjustments to the programmes.

Resolved:

- (i) The contents of Report 24/131, be noted.
- (ii) The proposed adjustments to the five-year Composite Capital Budget 2023/24 to 2027/28, as set out in Sections 5 and 6 of Report 24/131 and summarised in Appendices I and II to Report 24/131, be approved.
- (iii) The proposed adjustments to the Housing Investment Programme Budget 2023/24 to 2027/28, as set out in Section 7 of Report 24/41 and summarised in Appendix III to Report 24/41, be approved.
- (iv) Progress with the delivery of major Capital projects as summarised in Appendix IV to Report 24/313, be noted.

7. TREASURY ACTIVITY AND COMPLIANCE REPORT 2023/24 – 6 MONTHS TO 31 MARCH 2024

There was submitted a report by Strategic Lead – Finance and Business Support (24132) updating the Committee on Treasury Activity for the period 1 October 2023 to 31 March 2024 and to report on compliance with the Council's Treasury Management Policy Statement (TMPS), Investment Strategy and Prudential Indicators.

Resolved:

The contents of Report 24/132, be noted.

FINANCE AND RESOURCES COMMITTEE
OUTSTANDING BUSINESS STATEMENT (OBS)
(Report No. 24/179)

Please note that this statement sets out outstanding decisions of this committee along with an update and estimated completion date. Actions which are overdue are shaded for ease of reference. Where an update reflects that an action is complete then the Committee's agreement will be sought to its removal from the OBS.

No	Minute Reference	Subject Title	Outstanding Action	Update	Lead Officer/ Service	Action Due	Action Expected
22.	23 Mar 23 Executive Sub-Committee	Revenue Budget 2022/23 – Tayside Contracts	<p>Following the Executive Sub-Committee on 23 March 2023, the Convener was requested to write to Tayside Contracts suggesting that they set up a Performance/Scrutiny Sub-Committee to enable more regular in-depth monitoring of performance. The Convener did not receive a formal response.</p> <p>The Convener to write a further letter to Tayside Contracts asking for a formal response.</p> <p>The Strategic Lead - Legal and Governance to raise the issue of the</p>	<p>The Convener received a formal response from Tayside Contracts and the response was circulated to members.</p> <p>The Strategic Lead – Legal and Governance to meet with the Clerk of Tayside Contracts Joint Committee and the Head of Legal at Angus Council over the Summer recess to discuss the voting arrangements.</p> <p>COMPLETED</p>	Thomas Glen	12 June 2024	12 June 2024

No	Minute Reference	Subject Title	Outstanding Action	Update	Lead Officer/ Service	Action Due	Action Expected
			75% rule and the possibility of flexible voting arrangements with the Clerk of Tayside Contracts Joint Committee and the Head of Legal at Angus Council.				

PERTH AND KINROSS COUNCIL

Finance and Resources Committee

12 June 2024

PEOPLE AND CULTURE STRATEGY 2024-2028

**Report by Corporate HR Manager
(Report No. 24/180)**

1. PURPOSE

- 1.1 This report seeks approval of the People and Culture Strategy 2024-2028 (Appendix 1) and the associated action plan. This strategy supports our journey of transformation and change, providing a sustainable approach to resource planning as we reshape our organisation to ensure that we are empowering our teams to be the best they possibly can in order to deliver the best public services for the people of Perth and Kinross, focussed on need and within available resources.

2. RECOMMENDATIONS

It is recommended that the Finance and Resources Committee:

- A.** approves the People and Culture Strategy as set out in Appendix 1, which will be supported by an iterative action plan owned and led by the Strategic Leadership Team.
- B.** agrees that updates on progress of actions in the action plan and any new or emerging issues arising during the life cycle of the strategy will be reported annually to this Committee.

3. STRUCTURE OF REPORT

This report is structured over the following sections:

Section 4: Background/Main Issues
 Section 5: Proposals
 Section 6: Conclusion
 Appendix 1: Draft People and Culture Strategy

4. BACKGROUND / MAIN ISSUES

- 4.1 The Corporate Plan 2022/23-2027/28 (Report No. 22/311) set out the key priorities and vision for the Council, including the principles of how we will approach the delivery of services. Our Transformation and Change Strategy (Report No. 22/142) recognises that to achieve the ambitions of Council we will need to transform our organisation, including its size and shape. And our Financial Strategy (Report No. 22/141) recognises the unprecedented budget

challenges and need for responsible decision-making given the context in which we work. This People and Culture Strategy builds upon the foundation laid by these previous decisions to provide the enabler for our continued journey to reshape our organisation to ensure that we can deliver the best public services we can for the people of Perth and Kinross, focussed on need and within available resources.

- 4.2 The previous Corporate Workforce Plan covered the period 2021–2023. However, to allow the changes agreed through the Executive and Senior Leadership Review (Report No 23/195) to be fully implemented, officers agreed to defer the replacement of that plan until June 2024.
- 4.3 The new People and Culture Strategy is also an agreed management action emerging from the 2022/23 Best Value Thematic Review (Report No. 23/366). The Audit Scotland 2024 Best Value Theme is Workforce Innovation and this strategy incorporates feedback provided to date from the auditors. Any other future recommendations related to workforce planning will be incorporated into the action plan.
- 4.4 This strategy has considered the significant changes, opportunities and challenges which the Council and the wider public sector are facing, including:
 - Changing demands for services
 - Range of highly specialist skills and services required for delivery
 - Need for well-trained, adaptable and modern workforce
 - Increasing pressures on recruitment and retention experienced across all Councils in Scotland within an increasingly competitive recruitment market
 - Changing relationships with partners, stakeholders and communities to better manage demand and move to an evidence-based focus on need
 - Changing models of service delivery, including Council's role as a facilitator rather than a sole provider
- 4.5 The context in which we are now operating is set out in the Strategy, based around the values of **Ambition**, **Compassion** and **Integrity** to ensure that it delivers direction not only on what we need to do but also why, where and how we should be delivering that action. The operating context includes:
 - An ageing population
 - Our current workforce profile
 - Resource reductions and constraints
 - Leadership
 - Digital by design
 - Agile working and changing patterns of work
 - Engagement and inclusion
 - Fair Work First principles
- 4.6 To meet these challenges, we require strong workforce planning arrangements across the organisation with key milestones, sound governance arrangements and effective measures to monitor our progress in achieving

our priorities set out in the Corporate Plan, Finance Strategy, Transformation and Change Strategy and Digital Strategy.

5. PROPOSALS

- 5.1 The proposed People and Culture Strategy, as set out in Appendix 1, sets out our objective:

“To enable the delivery of a sustainable approach to workforce development, and a flexible and agile workforce with the right skills, values and attitudes to meet the needs of our communities now and into the future.”

- 5.2 It sets out how we will review our workforce in line with changing ways of working, retain and develop employees to meet current and future workforce requirements and expectation and changes to service delivery. Working together this way will enable us to meet the changing needs of customers and communities as well as supporting our employees to embrace these changes to deliver on the priorities in the Corporate Plan.

- 5.3 The Strategy builds on our existing focus on workplace culture, recruitment, and staff retention, Fair Work, learning and development, health and wellbeing, leadership and reward and recognition. Actions proposed within the Strategy will further develop our performance focus and provide clarity of expectation and support available.

- 5.4 From the consultation process, collated data and external sources a number of key issues were identified. These have informed strategic aims, objectives and actions proposed in the strategy. The core elements of the Strategy and associated action plan include:

- The need to address a number of external and internal drivers requiring a more co-ordinated approach to our workforce planning activity and to embed this into operational activity as a primary factor in effective service delivery.
- In order to attract and retain increased numbers of suitably qualified candidates our employment offer to potential candidates needs to be presented more attractively, tailored to target audiences.
- To support the development of a more flexible workforce there is a need to attract and retain employees who can embrace the ethos of a “One Council employee.”
- There is a need for greater flexibility in our policies and processes which facilitate the movement of employees to support both the delivery of essential services and, where appropriate, employee development.
- The need to continue to harness the use of technology to deliver efficient, transparent and accessible services that support our employees and communities in the best and most efficient and effective way possible.
- The need for employees to attend work regularly, be the best they can be to thrive, engage, be productive, creative and feel safe (physically and

psychologically) and supported at their work. To promote PKC as a truly inclusive workplace to allow employees to be their authentic self at work.

- To proactively and fairly support the Council's performance framework. Everyone will be required to manage performance ensuring clarity of role and expectations, delivering their role to the required standards. Everyone is expected to role model our values and behaviours in all that we do. The People and Culture Strategy will underpin a performance culture of accountability where feedback and developing performance is viewed positively and is designed to meet business needs.
- The importance of partnership working – we need to consider how we work with partners, ALEOs, Tayside Contracts and other Local Authorities to share ideas, best practice, effective use of resources, create development opportunities and to address changes in workforce requirements.

5.5 We aim to create a workforce that:

- Is the right size and shape to deliver our services and desired outcomes now and in the future, in line with our workforce planning, Council and Service/workforce plans
- Is well-led and empowered to deliver the Corporate Plan priorities.
- Has the appropriate skills and behaviours to enable delivery of the Digital Strategy to optimise the use of technology, internet, working remotely, being flexible, motivated and outcome focused.
- Is responsive to changing needs, new ways of working and delivering services differently.
- Is safe in the working environment and supported to be mentally and physically healthy with the right work/life balance.

5.6 The Strategy will be supplemented by a Workforce Planning Group with service representation to ensure that actions are actively managed, the plan is a live document and will be reviewed regularly to identify particular occupational groups, shortages, hard to fill, surpluses, areas of decline, skills and capacity building. This group will incorporate feedback arising from engagement activities, e.g. employee survey and any changes to external factors during the life cycle of the strategy. The representative on the group will act as channels for sharing of ideas, providing examples of good practice from operational teams along with any other guidance for managers and employees.

5.7 Actions arising from workforce planning locally will form part of the service operating models, one to one documents and Performance Development Discussions with employees.

5.8 Ownership of the Strategy and the associated actions is the responsibility of the Executive and Strategic Leadership teams. They are collectively responsible for the delivery of the corporate plan priorities and this strategy reflects the values and behaviours that will underpin the delivery of these across the organisation. Ongoing oversight of the action plan will be by the

Strategic Leadership Team, to ensure awareness and ownership of specific initiatives.

- 5.9 Updates on particular workforce actions will be provided, as appropriate, to EJCC and JNCT.
- 5.10 Ongoing engagement and communications with our workforce will be undertaken to ensure channels for feedback are open; to raise awareness of the aims of the strategy and associated actions; to promote and share other key changes impacting on people to ensure shared understanding and awareness of what is changing and why and promote learning and development opportunities and career pathways.
- 5.11 A plan on a page with the agreed strategy aims will be developed and published on the Council's website.
- 5.12 An annual update report on progress will be provided to the Finance and Resources Committee.

Future developments

- 5.13 Additional measures and initiatives arising from the financial context and Transformation and Change plan may necessitate other measures that enable the Council to deliver savings over the next three financial years. These may include:
 - Accelerating collaboration/shared services with other Councils and partners to achieve economies of scale and improve service resilience.
 - Building capacity for community led work and delivering more services in partnership with the third sector and community organisations.
 - Further reviewing our operating model in terms of organisational design toolkit i.e. numbers of direct reports to line managers and our overall management structures.
 - Ensuring that [financial principles](#) and the [vacancy management measures](#) are being actively applied and this may impact capacity and service provision in some areas.
 - Other employment considerations regarding flexible working arrangements, our use of buildings and utilising resources differently across the working week.
- 5.14 Our refreshed employee survey was developed in partnership with key stakeholders including the trade unions. This new annual survey was live from 15 April to 31 May 2024. The feedback from the survey will provide valuable information about leadership, staff communication, engagement, resilience and health and wellbeing. The survey results will give us an insight into how staff are feeling and what their specific issues are, providing the opportunity to deliver and support actions to address these. The results will be factored into our action plan and will be reported in future updates to this Committee.

6. CONCLUSION

- 6.1 Our staff do great work. We want to ensure that their contribution is recognised, that they feel valued for the work that they do and the difference that they make. As we continue on our journey of transformation and change, reshaping our organisation is essential to ensuring that we are prepared to deliver the best public services we can for the people of Perth and Kinross, focussed on need and within available resources. We have a clear vision, aims and aspiration for our workforce, and bringing our people on that journey is an essential part of that process.
- 6.2 The proposed People and Culture Strategy sets out the commitments to our employees to ensure that they have the right skills, knowledge, attitudes and behaviours to positively make a difference to those we serve.

Author(s)

Name	Designation	Contact Details
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Fiona Thomson	HR Manager	ftthomson@pkc.gov.uk

Approved

Name	Designation	Date
Greg Boland	Strategic Lead, Strategic Planning, People and Performance	May 2024

APPENDICES

Appendix 1 – Draft People and Culture Strategy

If you or someone you know would like a copy of this document in another language or format, (on occasion, only a summary of the document will be provided in translation), this can be arranged by contacting the Customer Service Centre on 01738 475000.
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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	Yes
Corporate Plan	Yes
Resource Implications	
Financial	n/a
Workforce	Yes
Asset Management (land, property, IST)	n/a
Assessments	
Equality Impact Assessment	Yes
Strategic Environmental Assessment	n/a
Sustainability (community, economic, environmental)	n/a
Legal and Governance	n/a
Risk	n/a
Consultation	
Internal	Yes
External	n/a
Communication	
Communications Plan	Yes

1. Strategic Implications

Community Plan/Single Outcome Agreement

1.1 The People and Culture Strategy supports all of the priorities within the Community Plan 2022-27.

- *Reducing Poverty (including child poverty, fuel poverty and food poverty)*
- *Mental and physical wellbeing*
- *Digital participation*
- *Skills, learning and development*
- *Employability*

Corporate Plan

1.2 The People and Culture Strategy supports the priorities within the Corporate Plan:-

- *Tackling poverty*
- *Tackling climate change and supporting sustainable places*
- *Developing a resilient, stronger and greener local economy*
- *Enabling our children and young people to achieve their full potential*
- *Protecting and caring for our most vulnerable people*
- *Supporting and promoting physical and mental wellbeing*
- *Working in partnership with communities*

2. Resource Implications

Financial

2.1 There are no direct financial implications.

Workforce

2.2 There are no direct workforce implications as a result of the development of the People and Culture Strategy.

The strategy will support the delivery of the corporate plan priorities and will operate in conjunction with other existing Council strategies. The action plan will be reviewed and outcomes and actions will be monitored and reported annually in terms of progress.

This proposal is put forward by the Corporate Human Resources Manager.

Asset Management (land, property, IT)

2.3 There are no direct asset management implications.

3. Assessments

Equality Impact Assessment

This proposal has been assessed as **relevant** and the following positive outcomes are expected following implementation:

- Increased opportunities for young employees arising from the action to increase the proportion of the workforce under the age of 30.
- Continued and developing support for employees who may experience barriers to inclusion and opportunity.
- Increased confidence among employees from minority groups to feel secure in being their authentic self in the workplace.
- Increased opportunities for all employees to access and benefit from career and personal development opportunities.
- Increased security for employees as a result of new approaches to workforce planning.

Strategic Environmental Assessment

The proposals have been considered under the Act however, no action is required as the Act does not apply to the matters presented in this report.

Sustainability

There is the potential for elements of the People and Culture Strategy to impact on our Climate Change efforts, namely hybrid working and its impact

on commuter traffic. As we develop each element this impact will be considered.

Legal and Governance

There are no legal implications.

Risk

The priorities set out in the Strategy and within this report are designed to **“enable the delivery of a sustainable approach to workforce development, and a flexible and agile workforce with the right skills, values and attitudes to meet the needs of our communities now and into the future.”** It is noted that the Strategy and action plan are live documents and will evolve due to changing priorities and as such risks will be identified, as appropriate.

4. Consultation

Internal

- 4.1 Internal consultation activity has been undertaken including Executive Leadership Team, Strategic Leadership Team, Senior Management Teams, Service Managers, Staff Disability Network and the Wellbeing Group. The Care and LGBTI+ Networks and employees were offered the opportunity to comment.

External

- 4.2 External consultation has focused on our recognised trade unions. Desktop exercises were undertaken of other organisations’ People and Workforce Strategy documents, related workforce data and other external publications e.g. CIPD Working Lives Scotland Report 2023, Audit Scotland Best Value Reports.

5. Communication

- 5.1 Following approval of the People and Culture Strategy, a plan on a page will be created and published on our website. The Communications Team will ensure that appropriate communications are used to cascade the Strategy.

Regular updates will be reported to committee during the lifespan of the Strategy.

2. BACKGROUND PAPERS

N/a

3. APPENDICES

Appendix 1 – People and Culture Strategy



People and Culture Strategy

Ro-innleachd Daoine is Cultur

2024-28

A Perth and Kinross where everyone can live life well, free from poverty and inequality

Table of contents

Foreword.....	3
Introduction	4
Our objective.....	5
Our operating context.....	5
Our culture	7
Our people	10
Our values and aims.....	14
Action plan	18

Foreword

Welcome to our People and Culture Strategy for 2024 – 2028. This strategy sets out our commitment to the people in our teams and our communities, and to ensuring that we have capacity and people in the right places to deliver on our vision of a Perth and Kinross where everyone can live life well, free from poverty and inequality.

As a Council we are on a journey of transformation and change, reshaping our organisation to ensure that we are prepared to deliver the best public services we can for the people of Perth and Kinross, focussed on need and within available resources.

Our workforce is fundamental to the achievement of this goal. We recognise the importance of creating an environment which allows our teams to be the best they can be. Ensuring that our people have access to training and opportunities which allow them to develop and to demonstrate the skills, values and attitudes which will meet the needs of our communities, now and into the future.

As a large organisation with teams working in a variety of settings and in a variety of roles there is no single solution to workforce planning. However, by aligning this strategy and action plans to our core values of ambition, compassion and integrity, we are providing a solid foundation to the co-ordinated planning which is needed to deliver a sustainable approach to workforce development across the Council.

As we move forward, we will continue to innovate, adapt, and grow. We will continue to listen, learn, and lead. And we will continue to put people at the heart of everything we do.

Thank you for joining us on this journey.



Thomas Glen
Chief Executive

Introduction

Perth and Kinross is the fifth largest local authority area in Scotland, covering a mix of urban and rural settlements, with 13% of the population living in remote rural areas, and the remainder spread between our villages, towns and Perth city itself.

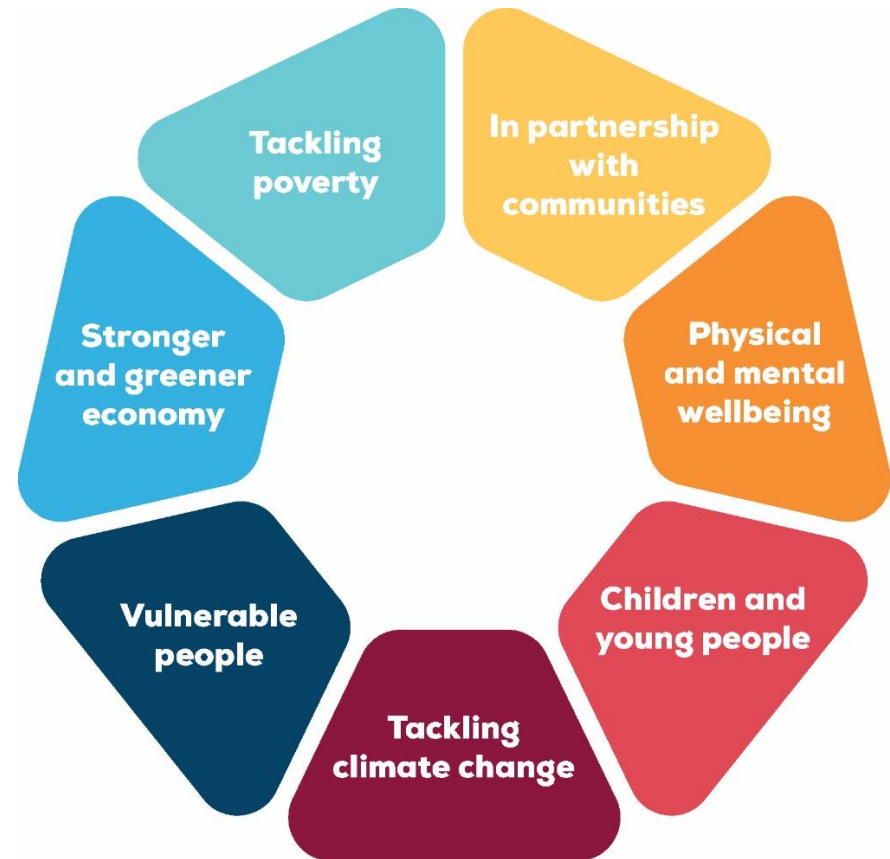
As a Council we are high performing and ambitious putting residents, communities, businesses and employees at the heart of everything we do.

Our [Corporate Plan 2022/23-2027/28](#) sets out our vision for a

Perth and Kinross where everyone can live life well, free from poverty and inequality

Within this we have identified seven interdependent priorities which, underpinned by our key principles, will determine our delivery plan over the period:

- ❖ Tackling poverty
- ❖ Developing a resilient, stronger and greener local economy
- ❖ Protecting and caring for our most vulnerable people
- ❖ Tackling climate change and supporting sustainable places
- ❖ Enabling our children and young people to achieve their full potential
- ❖ Supporting and promoting physical and mental wellbeing
- ❖ Working in partnership with communities



We are committed to making the best use of public resources and ensuring that we build upon our successes to empower our teams to provide the best services we can. We're also committed to enhancing the quality of life, not just for the people we serve, but also for the people who make our achievements possible: our dedicated and driven employees.

We recognise that they are fundamental to the delivery of our corporate priorities and achievement of our vision within the context of a very challenging financial landscape. This is reflected in one of the principles underpinning the Corporate Plan:

Supporting our workforce to be the best, ensuring they are well-trained and empowered to make decisions.

Our Transformation and Change Strategy is designed to ensure that we have the right capacity and people in the right places working to deliver our corporate priorities, within the resources available to us. Both the Transformation and Change Strategy and the People and Culture Strategy reflect the principles set out in the Financial Strategy and recognise that one of the main drivers for change is prudent financial management and implementing the decisions taken by Council that influence the size, shape of our workforce and what services will be delivered in future.

How we work is based on our values and behaviours framework, which was developed through extensive engagement and consultation with our workforce. Our values are drivers of our behaviours as an organisation and as individuals, influencing the way we work with each other as well as the people and communities we serve. They are weaved through our entire employee journey our recruitment process to our annual performance and development discussions.

Recognising the importance of these values we have placed them at the heart of this strategy, structuring it around our organisational values of **Ambition**, **Compassion**, **Integrity**.

Our objective

To enable the delivery of a sustainable approach to workforce development, and a flexible and agile workforce with the right skills, values, and attitudes to meet the needs of our communities now and into the future.

Our operating context

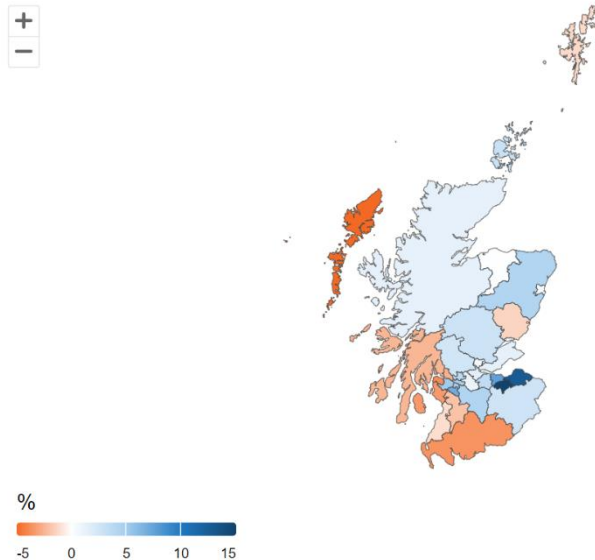
We provide services to individuals, households, communities and special interest groups across Perth and Kinross. From education to supporting our tenants and community councils; from managing our roads and household waste services to planning for the future, we deliver the services and infrastructure needed to make Perth and Kinross a great place to live, work and visit. As part of the Perth and Kinross Health and Social Care Partnership we also work with our NHS partners in new ways to deliver services with and in our communities. Together we work to ensure that people will receive the seamless support they need to live active, healthy and independent lives in their own homes for as long as possible. To deliver the best public services we can across such a diverse range of activities, while remaining focussed on requires effective management of a skilled and knowledgeable workforce.

The profile of the communities we serve is changing. The Census 2022 results show an increase in our population of 4,100 since the previous Census in 2011 (2.8% compared to a Scotland-wide increase of 2.7%). But between 2001 and 2021, there has been a 14% increase, the 7th highest percentage change out of the 32 council areas in Scotland and significantly higher than the 8.2%

People and Culture Strategy

increase in Scotland's population over the same period.

Population change, 2011 - 2022, council areas in Scotland



Source : [Scotland's Census 2022 - Rounded population estimates | Scotland's Census \(scotlandscensus.gov.uk\)](https://www.scotlandscensus.gov.uk)

Demographics – key issues

- **Ageing population** - 37,000 people (24.7%) in our area are aged 65 and over compared to 20.1% in Scotland; an increase of 22% since the 2011 Census. As a result there is an ongoing requirement for the services provided by the Perth and Kinross Health and Social Care Partnership. This increase also highlights the importance of working with both commissioned service organisations and our communities to meet this need. The model of delivery will continue to change with the planned introduction of a

National Care Service and we will adapt our approach in line with this.

- **Fewer children and young people** - Census 2022 indicated that there has been a reduction in our 0-14 years population – 14.7% compared to 15.9% in 2011 and lower than the 15.3% for Scotland overall. We continue to consider and adapt to these changes. This changing profile also requires flexibility and in-demand skill sets from our workforce who deliver social work and care, early learning and childcare and teaching directly to children, young people and their families. It also impacts on how we plan for and manage the provision of nurseries, schools and other infrastructure requirements.
- **Child poverty** - Nearly 6,000 children in Perth and Kinross are living in poverty ([Local Child Poverty Action Report 2022/23](#)). The causes and impacts of child poverty are complex. There is no single solution to poverty as each household's circumstances will differ. The Council has identified this as a key priority and, with partners, will lead action to prevent and mitigate the impacts of poverty for children living in Perth and Kinross.

How we work

Our workforce is united by our shared purpose to deliver the best public services we can, focussed on need and within available resources. To deliver this our people need to be flexible, compassionate and apply a can-do attitude. They also need to have confidence, demonstrating our values and behaviours and the skills to challenge and re-design existing processes to adapt to the

changing needs of those we serve. This is fundamental to delivering the best public services for the people of Perth and Kinross.



As one of the largest employers in the area, we have an important part to play in role-modelling inclusive employment practices. We are committed members of initiatives such as Living Wage, Carer Positive, Disability Confident, Young Person’s Guarantee and the Armed Forces Covenant. These reflect the commitment that we make as an employer to support the different groups within our workforce and our communities. We continually develop and improve the services we provide to place inclusion at the heart of our strategies and plans e.g. the [Joint Carers Strategy](#), [Accessibility Strategy](#) and [Corporate Parenting Plan](#) and specific posts to deliver these e.g. in the Employability, Equalities, Social Care and Communities teams.

As well as providing services to support local residents, as an employer we can also provide opportunities for people to access employment, which can be one of the biggest factors in allowing service users to become self-sufficient. We do this by working with

local partners by for example, providing all our vacancy details to the DWP Job Centre to ensure that jobseekers are aware of opportunities to work with us. We are also working with Perth Autism Support to refresh our policies and practice and develop toolkits to ensure that neurodiverse job applicants and colleagues are supported to access opportunities. Our Modern Apprenticeship programme recruitment includes a guaranteed interview for applicants who are care-experienced.

Our approach to inclusion is a key aspect of our Fair Work agenda through which we work in partnership with our trade unions to deliver Opportunities, Effective Voice, Fulfilment, Security and Respect to our employees as part of our day-to-day activity.

Our culture

Like many other large public sector organisations, we operate in an increasingly complex environment where the needs of our communities have changed significantly and continue to evolve. This requires our employees to embrace change by being flexible, developing the skills and knowledge to adapt, which allows us to target our resources to those areas of greatest need. We have recognised this through the development and delivery of our ongoing cultural change programme which seeks to support staff to understand the changing demands and expectations of the Council.

Leadership

A key aspect of our Transformation and Change work has been the delivery of a Senior Leadership Review. This review embedded our vision and set the cultural foundations for how we will engage and

People and Culture Strategy

operate with and for our communities in future. All of this was achieved by extensive engagement with employees and communities during 2022/23 to build relations, make connections and create a sense of what we can do together. This new operating model is designed around 4 pillars:

- ❖ Leadership culture and behaviour
- ❖ Leadership engagement across the Council, with partners and communities
- ❖ Leadership and management competence and performance
- ❖ Leadership structures and capacity across the whole organisation

As a result, we have reshaped and restructured our resources to establish new portfolios aligned to our corporate plan priorities. As well as establishing a new executive and senior leadership structure a Leadership Competency Model has been developed which, along with our Values and Behaviours, will further enhance our performance focus providing clarity of both expectations and the support which is available.

We are now undertaking the next phase of reshaping our organisation to carry the focus on our priorities right through every role and team. The newly appointed Strategic Leads will play a critical role in driving and delivering this change both within their area of responsibility and collaboratively across the Council.

Engagement and inclusion

Enabling everyone in our teams to have a voice is fundamental to working together. Ensuring that this is embedded in how we work will support equality of opportunity for all our employees.

All new employees are invited to in-person induction events led by the Chief Executive and Leader of the Council. These in-person events were re-introduced in 2023 and demonstrate the commitment from senior leaders to welcome new employees and share from the outset our vision and what it means to be a public servant in Perth and Kinross Council. These events set the cultural tone and have a focus on sharing and understanding our values and behaviours. The accompanying “connection marketplace” gives an opportunity for new staff to make connections with existing teams and engage with colleagues to gain a greater sense of who we are as a Council, why we exist and what we can collectively achieve for those we serve.

We are strengthening our engagement offer to provide opportunities for our employees to comment on and influence how we work through:

- ❖ More structured one-to-one conversations
- ❖ Focused workshops
- ❖ Events such as the What Matters to You programme in the Health and Social Care Partnership
- ❖ Involving trade unions and employees in developing our new employee survey.

The 2024 employee survey (live from 15 April to 31 May 2024) will produce action plans at team and organisation level which, in line with previous practice, will be followed up using “You Said, We Did” updates. This continuous engagement is enhanced by the implementation of recognition events allowing managers to

acknowledge the contribution of teams and individuals who demonstrate our values and commitment to excellent service.

We will continue to work with our trade union partners to engage openly and constructively regarding the challenges we face in the management and development of our workforce. We will encourage ongoing conversations to ensure their voice is heard as part of that process.

Through our work on the Fair Work agenda we ensure that fairness and equity is at the heart of all the Council’s employment practices. We are committed to promoting equality and diversity across our workforce and to actively supporting individuals and groups within our employees. We work to eliminate discrimination, harassment, victimisation or any other prohibited conduct, advancing equality of opportunity and fostering good relations. Equality training forms a part of our induction process ensuring that our employees are aware from the start of their employment journey of the culture we are developing and the support that is available. Other activities include unconscious bias training as a compulsory element of our recruitment process, advice and support for reasonable adjustments to processes and working arrangements and the availability of our Staff Networks which provide peer support and advice.

Empowerment

Our employees are first and foremost public servants. Offering everyone a fulfilling working experience is an essential part of our efforts to make the most of the skills of our employees and to develop the services most needed by our communities. Our “Think Yes” approach to individual and team responsibility empowers our

teams to be the very best they can be to deliver excellent public services for the people of Perth and Kinross.

Growth

Ensuring that our employees have the right skills and knowledge is informed by our understanding of and planning for the required services. Our Leadership for All programme ensures ongoing development and training opportunities for managers and leaders at all levels across the organisation. Our move in 2023 to a longer-term financial planning framework allows our managers and employees to understand how the demands and constraints on our services will change. Our learning and development activity supports employees to prepare for and adapt to planned changes. This will be delivered by enhanced personal and career development tools and changing ways of working including the use of hybrid and revised patterns of attendance, all of which are designed to optimise fulfilment and increase flexibility in our workforce.

Innovation

Having open minds and an innovative approach to opportunities and working arrangements will generate the best possible outcomes for all organisations and our communities. Our model of delivery continues to evolve, and this requires a culture which embraces partnership and collaborative working and the creation and adoption of innovative approaches to service delivery.

We have many rich and productive external working relationships in the area including with our Arms Length External Organisations (ALEOs), Tayside Contracts and partner organisations such as the

People and Culture Strategy

Perth and Kinross Association of Voluntary Service (PKAVS). These produce many opportunities for innovative thinking in service design and delivery.

Supporting this, our Digital Strategy outlines the need for bold digital leadership that upholds 'One Council' values. Our forward-looking approach to digital work allowed us to swiftly adapt to the challenges of the pandemic. We have continued to build on this with a proactive and forward-thinking Digital Skills team ensuring that our employees have access to learning and tools which allow them to maximise the benefits of the technology we have available. Our development team also work with services to develop in-house opportunities to streamline, digitise and automate processes. Our MyPKC Portal for example provides an efficient way to access many of the tasks employees and managers routinely undertake.

Our people

We must respond to the demands for the services we deliver and changing expectations of the employees who deliver them. For example, we have an intergenerational workforce and this brings different expectations and poses different challenges e.g. attracting young workers to local government, losing the skills and knowledge of workers choosing to retire early and the impact of aging employees continuing to work. We are aware that what an older worker wants from work is very different from a young person. Working to meet these different expectations is an important means to addressing retention issues in specific areas.

The extended period of home and then hybrid working experienced by some of our employees has generated an ongoing review of our

approach to hybrid working. There are opportunities to be explored in how this can facilitate the achievement of our priorities and support our employees and we will continue to develop this. However a hybrid work style is not an option available to the majority of our employees due to the nature of the work they undertake. Our Flexible Working Framework provides the foundation to allow other forms of flexible working options including different working patterns, the application of special leave provisions and use of career breaks. This will continue to be developed during the life of this strategy.

As at 1 May 2024 our workforce of 5,878 employees is predominantly:

- ❖ Female (73%)
- ❖ White (98%)*
- ❖ Non-disabled/ experiencing a long term health condition (98%)*
- ❖ Permanent (90%)
- ❖ Full Time (61%)

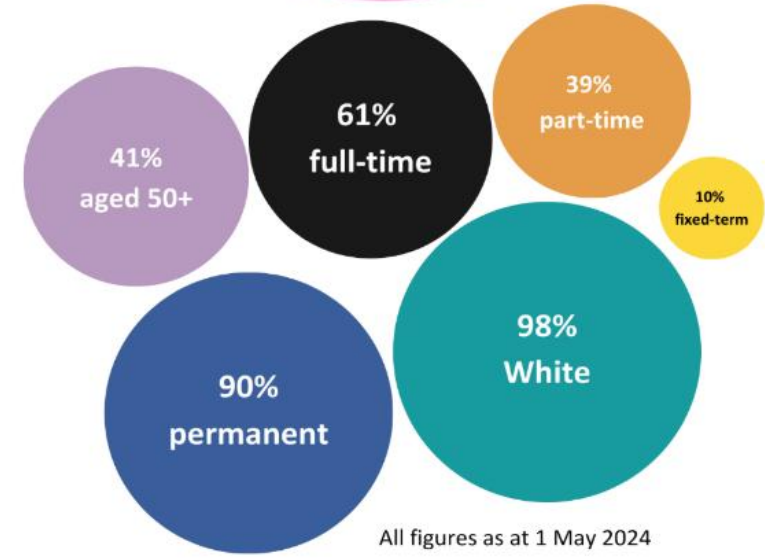
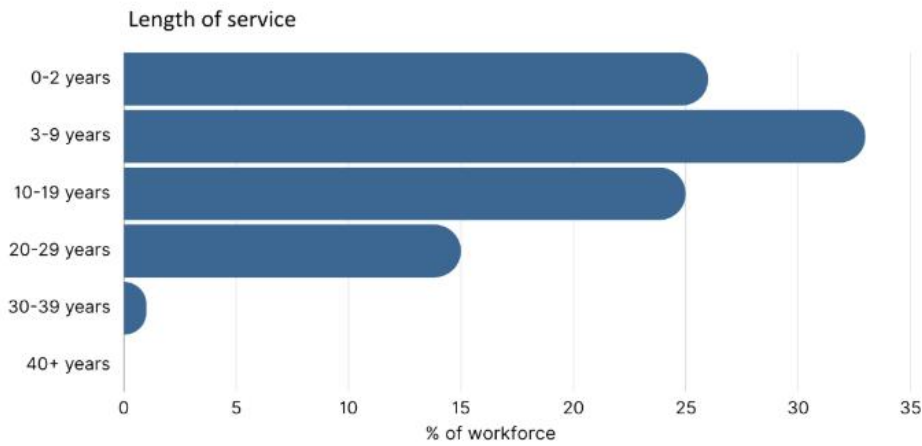
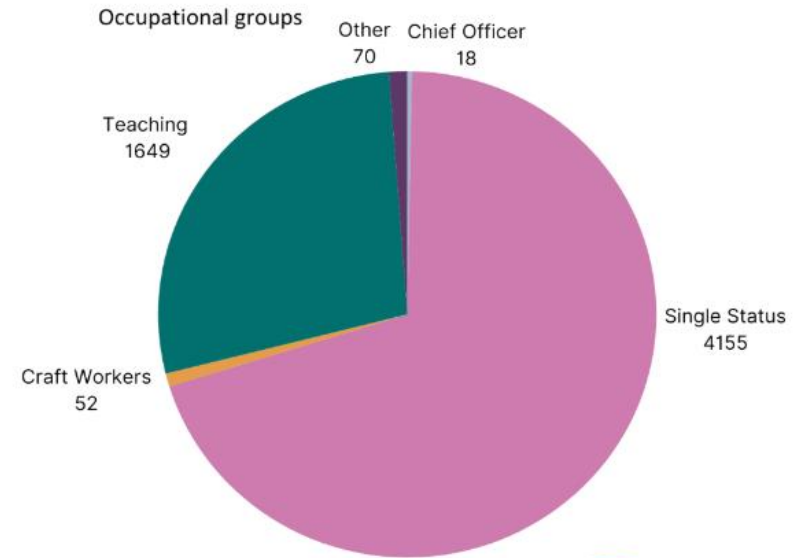
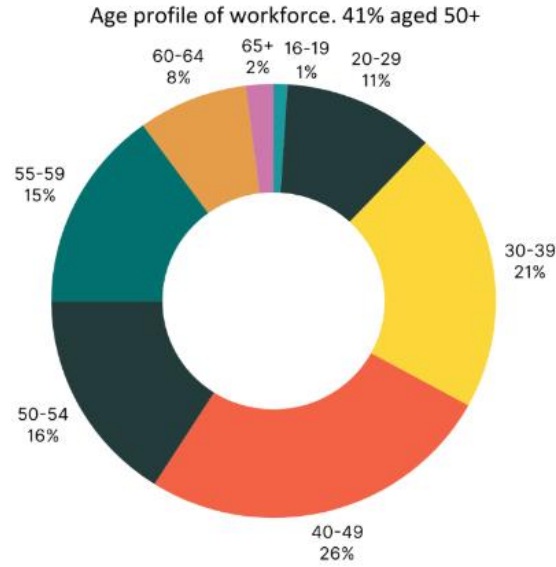
*of those who provided a response

With:

- ❖ A median workforce age of 45 compared to a Scottish median age of 43 and Perth and Kinross median of 48 (40 - 49 being the most common age group)
- ❖ An average service of 11.2 years and turnover of 10%
- ❖ Approximately 1,600 employees having access to hybrid working arrangements

- ❖ Around 33% of our workforce working outside of a “Monday-Friday, 9-5” pattern and 12% scheduled to work over weekends
- ❖ Technical, Administrative and Support roles (TAS6, 7, and 8) being the most common grade

Workforce information (May 2024)



Along with other employers we continue to experience difficulties in attracting new employees because of increased volatility in the number of people looking for work and increased demand/advertised vacancies. Scotland's Labour Market Trends report (published in April 2024) showed a reduction in the unemployment rate and corresponding increase in the employment rate which demonstrates a continuing challenging recruitment market.

Our offer has been enhanced in the past 12 months with the launch of a dedicated platform providing access to a wide range of employee benefits designed to help employees' physical, mental and financial wellbeing. This sits alongside ongoing health and wellbeing advice and support from an Occupational Health provider and peer support Staff Networks.

We have also adapted to the challenges faced in recruitment with increased innovation in how we make use of social media, including videos and advert design. Although having a positive impact for some roles, 27% of posts advertised in the 12 months to April 2024 were re-advertisements for particular occupational groups. Re-advertising activity has not only been in our traditionally hard to fill positions in areas such as social care, social work and specific teaching posts, but is now extending into regulatory roles e.g. Clerk of Works, Environmental Health and Trading Standards Officers, technical positions including Planners, Architects and Building Standards Officers and other positions in our Health and Social Care Partnership such as Occupational Therapists.

Learning from experience

We will continue to review, refresh and tailor our approaches to adapt to meet arising and ongoing challenges during the lifetime of

this strategy. This includes the evolving model of delivery in Social Care where there is an increasing need from our communities. We will continue to work together with our partners and commissioned service providers to use our collective resources to ensure the right skills are available and statutory minimum staffing levels are maintained. In 2023 we launched a targeted campaign to attract new employees into social care. This included social media campaigns and other advertising, and it delivered excellent results. Sustaining this impetus and outcome in the short term is essential while looking at alternative approaches to how service delivery is organised in the longer term.

We will continue to engage with national initiatives for targeted occupational recruitment and retention campaigns, such as the recent national pilot of Modern Apprenticeships in Building Standards. Our participation resulted in the recruitment of two Modern Apprentices in these roles and the incorporation of these roles in the related career pathway and future succession planning.

We will build on existing tools and previous experience through internal redeployment e.g. the Learn to Teach initiative to develop our existing talent. This approach builds on the values and behaviours which already exist within our current workforce and gives them the new knowledge and skill sets required to deliver the services needed by our communities.

As we continue our journey of transformation and change to reshape our organisation, we are aware of the context of delivering a budget saving of £1.6M over the next three financial years. This second phase of our Leadership Review will be delivered within the context of examining the structures and capacity we need across

People and Culture Strategy

the whole organisation to ensure that our approach to focussing on need and alignment to our Corporate Plan priorities is embedded at all levels of leadership. In reviewing our middle management group, we need to balance the need for stability drawing on experience and expertise of our existing staff whilst establishing a framework for the identification and development of our next cohort of leaders. It is important that we transition to the new operating model in a safe, structured and planned way. The existing age profile of middle management/leaders (those in Team Leader and Service Manager positions) indicates that 72% are aged 50+ and 13% are over 60. Identifying future talent is also important to ensure that we continue to have the right skills, values and behaviours needed to lead across our organisation in future. Services will continue to ensure that effective resource planning is embedded into operational activity to maintain effective service delivery and mitigate any risk arising from potential loss of skills, knowledge and experience in key roles.

Our values and aims

Our values and behaviours define not only how we deliver the services that the people of Perth and Kinross need, the expectations we have of our employees and how we can support them, but they also underpin the fact that people are at the heart of what we do.

Our One Council approach will flourish through a focus on empowering our staff to be part of the best possible teams, connecting with each other and our communities, by thinking yes, putting people before processes, and by having business heads and social hearts.

Ambition

We have an ambitious Corporate Plan vision and priorities to deliver. Adopting a mindset of continuous improvement requires everyone to generate and be open to the creative ideas and opportunities needed to realise this. Everything we do must contribute to taking forward the design and delivery of the best public services we can for the people of Perth and Kinross, focused on need and within available resources. We do this most effectively by taking an evidence-based approach to decisions, avoiding unnecessary bureaucracy, and by working together across teams and by thinking yes.

Our leadership will work together and across service areas to deliver the actions required to achieve the priorities we have set out. They will be required to be innovative and take responsibility for their own performance and that of their teams. Considering new ways of working, maximising existing and new technology to make processes as efficient as possible for our customers and our employees and working with partners, ALEOs and other local authorities to deliver effectively will be key aspects of the work of our leaders. We will do this through the identification and development of future leaders at an early stage in their careers using our competency model and values and behaviours as the basis for the model of their development, career grade structures including apprenticeship and graduate programmes and complimenting these through the opportunities offered by external networks to provide a different focus to their thinking.

Ambitious for our people

Our Values and Behaviours Framework, and Leadership Competency Framework clearly demonstrate the attitudes, behaviours and skills that our employees need to enable them to be successful in their roles. We need to emphasise these in our recruitment process under the banner of a “One Council Employee” and to ensure applicants understand the expectation that they will be flexible in what, where and how they deliver the best public services for the people of Perth and Kinross as well as creating the opportunities for their own ambitions to be achieved.

In addition, our managers and employees have access to a suite of supporting tools to improve the design and delivery of our services including:

- ❖ Job Families Framework
- ❖ Framework for Managing Workforce Change
- ❖ Internal-only vacancy opportunities
- ❖ Leadership and management development opportunities
- ❖ Career grade structures
- ❖ Flexible Working Framework
- ❖ Vocational training and development

In a large and diverse organisation, it is appropriate that different teams will make use of tools that best meet their needs. Our aim is to review and refresh the application of tools to optimise their use to align with future business needs. Embedding workforce planning and development into operational activity will support the delivery of our priorities. We will share best practice across teams and with partners, ensuring that the contribution of our employees is considered at every stage of service delivery.

Our Digital Strategy 2023-27 also provides direction for the way that we deliver these services and the need for our workforce to be open to change, adapt processes and develop skills to ensure that we maximise the benefits that can be harnessed from technology. It mirrors the ambition of growing a culture of “One Council” and recognises that digital transformation is as much about cultural and organisational change as it is about technical change, the input of our employees is key. We recognise that employee investment in innovation, automation, streamlining and sharing frees them up to do what they do best i.e. creates capacity to work compassionately with the people who need our services.

Our Financial Strategy Principles highlight the importance of ongoing, meaningful communication and engagement with our communities, partners and employees to ensure that we can effectively prioritise the delivery of services which we must provide by law and deliver services in the most efficient and cost-effective manner.

Tackling climate change is a priority for the Council. Our Climate Change Strategy and associated Action Plan have been developed to address the necessary action to make both Perth and Kinross Council area and the Council itself net zero and climate resilient. The Climate Action Plan has been divided into eight thematic areas, each requiring contribution from our employees and the development of related skills and knowledge to achieve the targets e.g. our mechanics developing the skills to manage our EV fleet, our property team developing understanding of approaches such as Passivhaus standards.

Compassion

Supporting our employees is of the highest priority as they are our most valuable resource and critical to delivery of our services. Providing clarity on the roles they are expected to deliver and providing an environment where they can feel comfortable being their authentic self allows us to recognise the pressures that different aspects of their lives can place upon them, and means we do all we can to support them to be at work, be engaged, and the best they can be. This will support good mental and physical health and all aspects of employee wellbeing and, in return, develop the commitment that that results in high-performing, compassionate service delivery.

Moving forward with compassion

The need for agility and the importance of this for the organisation to thrive and be productive requires employees to adopt a flexible, resilient and creative mindset equipping them for change. Focusing delivery on the corporate plan priorities and outcomes means we will need to deploy our people in different places and at different times to best meet the needs of our communities.

We have tools to support flexibility in role and working practices e.g. job design, job families, the flexible working framework including the use of hybrid working and differing working patterns, and the framework for managing workforce change and these will continue to be used and developed. Reviewing our processes to ensure agility and freedom from unnecessary bureaucracy will further support our speed of response to business need. The application of these tools will assist our employees to take the

initiative and examine options for their own wellbeing and development during change.

We are further developing the tools that we have in place to support the wellbeing of our employees e.g. the development of a Trauma Informed Workplace, the provision and promotion of an Employee Assistance Programme.

Proactive work to develop resilience and reduce our sickness absence levels is being further developed to optimise attendance and support, not only for those who have been absent but also their colleagues who are at work. From both an employee wellbeing and financial perspective this is one of the most impactful actions we can take.

We also have well established Staff Networks (LGBTi+, disABILITY, Belong, Carers and Women and Men's Health Groups) which provide peer support and a sounding board in the development of policies and practice (and who participated in the development of this strategy). In the face of changing attendance and work patterns of those attending these groups we need to ensure that the support mechanisms and information that are provided meet the needs of all employees to optimise opportunities for access and effective voice. We will continue to work with the members of these groups, our trade unions and other employees to promote the continued value of this approach and ensure the ongoing effectiveness of the groups.

Integrity

Being honest and transparent with our communities, partners and workforce is a key element of how we operate. Behaving in a fair

and consistent manner contributes to building trust in our workforce which supports effective long term workforce planning, engagement, productivity, and development activities.

Working with integrity

The move to a longer-term budgeting cycle has allowed us to understand our workforce requirements over a longer period and share our expectations on demand, transformation and service delivery with external and internal stakeholders earlier. As a result we know that numbers in some areas of work will reduce whilst other areas will need an increased or different type of resource. Being open about these changes now and taking a longer-term approach to resource planning allows managers and employees to explore opportunities proactively and consider the future business and skills needs for those impacted by change. This contributes to the development of a culture which instils confidence and trust in the plans for the future which are being shared. Gathering feedback from employees and other stakeholders, and importantly taking appropriate action as a result, will contribute to that culture. Trust between leaders and their teams requires to be fostered to support this change in environment. Managers will be provided with the necessary tools and skills to deliver difficult messages to customers, trade unions and employees.

Our public commitments to the accreditations awarded to us through Living Wage, Disability Confident (Leader), Developing the Young Workforce, Carer Positive, Equally Safe at Work (Developing) and the Armed Forces Covenant (Gold) requires us to adhere to the principles of each accreditation and deliver specific actions. Continuing to deliver these commitments is essential to build on

the existing trust and relationships that exist in these areas not only with our employees but also with our communities.

Operating in a truthful and open manner is fundamental to being able to progress our corporate objectives and actions.

Action plan

Our identified actions are summarised in the following table where those responsible for delivery and the indicators of success are included. More details and individual actions will be contained in individual service plans.

Working in a changing environment means priorities in our four-year plan will shift and there may be things outside of our control that will change in this period. We have newly appointed senior leadership roles with reconfigured portfolios that we are transitioning as a workforce into. Our culture is evolving and we will require to continue to embed this throughout the employee life cycle to ensure that we have the right people in the right place who are thriving, engaged, performing and developing. This is the beginning of this process and regular review and reporting will ensure continued relevance and provide the opportunity to change related actions to reflect shifting priorities. Consequently, the actions below are those planned for the first two years of this strategy and, although some will continue through to 2028, the timescales for their delivery are noted for this period only.

We will monitor our performance for each action, reporting progress on an annual basis to the Finance and Resources Committee.

Ambition

Area of focus	Key actions	Responsible	Timescale (indicative, tba by SLT)	Measures of success
Promote the opportunities that PKC offer to potential employees in the most positive way highlighting the importance of a “One Perth and Kinross” employee approach to their PKC career.	Continue with building a strong Perth and Kinross Council brand promoting the ethos of being a public servant that delivers strong and diverse candidate pools ensuring we have the right people with the right attitudes and behaviours,	Strategic Lead, Strategic Planning, People and Performance (SPPP), Service Managers	2024/25 Q4	Reduce the proportion of advertised vacancies which remain unfilled and require re-advertisement Reduced staff turnover in first year of employment (2023 = 23%)

	creating a more agile, flexible and effective workforce			
	Develop a specific offer to attract and retain young people beyond entry roles including apprenticeships and personal and career development opportunities maximising enhanced connections with Further and Higher Education establishments and other organisations such as local DYW support	Strategic Lead SPPP, Service Managers	2025/26 Q1	<p>Launch of a structured programme of development opportunities aimed at those under 30</p> <p>Increased retention of those under 30 (currently 18% of leavers)</p> <p>Increased proportion of employees under 30 (2023 = 12%)</p>
Develop an integrated set of flexible tools that will allow managers and employees to identify and address opportunities and challenges for our workforce and access the development and support required to give them the best opportunity to	Identify how different tools and technology can be developed and used by managers to facilitate necessary changes from small changes in team structure to complete service re-design exercises and ensure	Strategic Lead SPPP	2024/25 Q4	Demonstrate the effectiveness of re-skilling and redeployment processes through the reduced number of voluntary and compulsory redundancy processes

People and Culture Strategy

achieve and thrive in those opportunities.	managers understand how this can be achieved.			Increased proportion of the workforce are under 30 (12% - May 2024)
Develop a strengthened approach to workforce planning that enables proactive workforce planning across Services and external partners, reflects our revised delivery model and links to our corporate priorities to ensure that learning and best practice identified in one area can be adapted and implemented in other Services or with different occupational groups.	Create workforce plans for service and occupational areas identifying likely future gaps and challenges and developing responses to these.	Service Managers	2024/25 Q3	<p>Implementation of workforce plans in Strategic Lead areas including the use of succession planning</p> <p>Launch of structured leadership development programme</p> <p>Participation in national development initiatives.</p>
	Establish a Workforce Planning Forum bringing together service and occupational group representatives, those with related expertise to ensure delivery of actions, raise awareness of planned workforce changes, inform the development of tools and initiatives and share best practice	Strategic Lead SPPP, Strategic Leads	2024/25 Q2	<p>Bi-annual review of workforce plans and initiatives</p> <p>Annual Workforce Planning Report to appropriate committee.</p>

	Use the output from the Workforce Planning forum to inform workforce discussions at Senior Leadership Team, Corporate Priority Thematic Meetings and planning meetings with external partners	Corporate Priority Leads, Strategic Leads	2024/25 Q2	<p>Reduced likelihood and overall risk of workforce issues on Corporate Risk Register</p> <p>Cross-service workforce planning initiatives bringing resources together to deliver Corporate Priorities</p>
Continue to harness the potential of technology to free up employee time to support our communities in the best way possible	Include workforce implication considerations in the evaluation of proposed digital projects	Strategic Lead, Customer and Digital Services	2024/25 Q3	Revised process to allow Workforce Planning Group contribution to Digital Board decision making
	Continue to develop our Flexible Working Framework to reflect the needs of our Services, developments in technology and in light of the changing Council Estate profile.	Strategic Lead SPPP	2024/25 Q4	Implementation of updated Flexible Working Framework

Compassion

Area of focus	Key actions	Responsible	Timescale (indicative, tba by SLT)	Measures of success
Develop ways of working and programmes to further support the wellbeing of our employees individually and as a collective, maximise our levels of attendance and facilitate excellent performance whilst at work.	Using our operational health and wellbeing plan create a health and wellbeing pathway for change across PKC and the P&K HSCP which identifies the elements of a healthy workforce and the specific steps required to achieve this.	Strategic Lead SPPP	2024/25 Q4	Creation and implementation of the Health and Wellbeing Pathway
	Review our policies, supporting information and services to ensure that managers are confident in their use and that our employees are supported while at work and during all types of period of absence.	Strategic Lead SPPP, Service Managers	2024/25 Q4	Reduced Absence Levels reported annually to the Local Government Benchmarking Framework (2023 Teachers – 8.9 days, LGES – 13 days)
Review and enhance the measures which allow employees to feel safe, physically and	Work with trade unions and employees to develop reporting mechanisms to further	Strategic Leads	2025/26 Q2	Reduced numbers of reports of violence and aggression

<p>psychologically, and supported at their work.</p>	<p>develop understanding and responses to instances of violence and aggression at work across all roles.</p>			
	<p>Continue to promote the support available through existing staff networks and wellbeing information and undertake activity to increase accessibility of these resources to all employees.</p>	<p>Strategic Lead SPPP, Service Managers</p>	<p>2024/25 Q4</p>	<p>Increased awareness and participation in staff networks</p> <p>Increased use of Employee Assistance Programme resources</p> <p>Reduced absence levels attributable to mental health</p> <p>Increased levels of protected characteristics disclosure through MyView</p>
<p>Develop understanding to allow us to move to a place where we develop, not manage performance and where this is viewed</p>	<p>Review existing policies and practices designed to address performance issues such as the capability procedure, PDD and one to</p>	<p>Strategic Lead SPPP, Service Managers</p>	<p>2024/25 Q4</p>	<p>Increased PDD completion levels.</p>

People and Culture Strategy

positively by those involved.	ones/supervision meetings and ensure that employees and managers understand how these support the development of performance.			
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Integrity

Area of focus	Key actions	Responsible	Timescale (indicative, tba by SLT)	Measures of success
Recruit and develop employees and leaders who will operate in a way that is true to our Values and act as role models for all colleagues.	Review our recruitment tools and guidance to include an enhanced focus on our Values and Behaviours and incorporate this in the recruitment, induction and on-going development of managers and leaders.	Strategic Lead SPPP, Strategic Leads	2024/25 Q3	Increased positive feedback in employee survey (2024 baseline to be established)
Explain proposed changes to our recognised trade unions and workforce in a timely manner that allows their participation in long	Use the Fair Work principles to underpin our trade union relationships, particularly Effective Voice, to facilitate open	Strategic Leads and Service Managers	Ongoing	Continued positive trade union relationships.

<p>term planning and responding effectively to the change.</p>	<p>discussion and partnership working.</p>			
	<p>Provide clear and regular communication to employees using methods that are accessible to everyone.</p>	<p>Strategic Leads and Service Managers</p>	<p>Ongoing</p>	<p>Improved awareness among employees who do not routinely access Eric (intranet).</p>
<p>Engage with our employees regularly to gather their views and implement actions arising from this at organisational, Service and team levels.</p>	<p>Create and deliver action plans arising from the 2024 employee survey</p>	<p>Strategic Leads and Service Managers</p>	<p>2024/25 Q4</p>	<p>Year on year increased employee participation level (2024 baseline to be established)</p> <p>Improved results to successive surveys (2024 baseline to be established)</p> <p>Sharing and implementation of action plans.</p>
<p>Ensure that our reward and recognition mechanisms are fit for purpose.</p>	<p>Ensure that national agreements are implemented quickly and effectively.</p>	<p>Strategic Lead SPPP</p>	<p>Ongoing</p>	<p>Implementation of nationally agreed pay awards/changes to terms and conditions in a timely manner.</p> <p>Proactive consideration of structures and policies</p>

People and Culture Strategy

				<p>ensuring continued appropriate application of agreements.</p> <p>Delivery of at least 4 employee recognition events at Chief Executive and Director/Strategic Lead level per year</p>
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PERTH & KINROSS COUNCIL

FINANCE & RESOURCES COMMITTEE

12 JUNE 2024

PROCUREMENT UPDATE

**Report by Strategic Lead - Legal and Governance
(Report No. 24/181)**

1. PURPOSE

This report provides an update on the Council's procurement activity, setting out an Annual Procurement Report for financial year 2023/24 and the planned procurement activity for future years.

2. RECOMMENDATION

2.1 It is recommended:

The Finance and Resources Committee is requested to:

- Approve for publication the Procurement Annual Report 2023/24;
- Note the record of tenders accepted during 2023/24 under the Councils scheme of delegation;
- Note monies provided to third parties under the Code of Guidance for Following the Public Pound during 2023/24; and
- Note the planned procurement activity as far as known for future years.

3. STRUCTURE OF REPORT

3.1 This report is structured over the following sections:

Section 4: Background

Section 5: Proposal

Section 6: Conclusion

Appendix 1: Procurement Annual Report 2023/24

Appendix 2: Contract Delivery Plan 2024 onwards

Appendix 3: Tenders Accepted 2023/24

Appendix 4: Following the Public Pound 2023/24

4. BACKGROUND

4.1 This report records the procurement activity carried out by the Council during 2023/24. The appended report gives more detail on the procurement contribution to achieving the aims and objectives of the Council.

4.2 Annual reporting on procurement activity became a statutory duty following the implementation of the Procurement Reform (Scotland) Act 2014 (the Act)

and the Council is required to provide both a retrospective Annual Report, as well as setting out its procurement activity going forward.

- 4.3 This report has been prepared in line with guidance issued by the Scottish Government. The statutory duties set out by the Act are explicit and include a requirement to provide information on all regulated procurement exercises. The Government guidance provides a template to ensure all reporting public bodies in Scotland provide broadly comparable data.
- 4.4 The Act requires that notification of publication of our Annual Report be made to the Scottish Ministers.
- 4.5 Subject to approval by this committee, the Annual Report will be published on the Council's website to meet the Scottish Government reporting requirements.

5. PROPOSAL

- 5.1 This reporting requirement is set out in:
- the Council's Scheme of Administration;
 - the Council's Contract Rules; and
 - the Code of Guidance for FPP

which establish the requirement for Executive Directors to report on the how the Council attends to its tenders and the monies it provides to third parties annually.

- 5.2 The publication of this type of information enhances transparency in our purchasing activities and helps us to promote the opportunities for working with Perth and Kinross Council.
- 5.3 The report includes analysis of the numbers and sizes of businesses located in the Perth and Kinross area who have registered an interest in the provision of goods and services, or conclusion of works on behalf of the public sector in general.

6. CONCLUSION

- 6.1 The Annual Report presented provides an overview of the procurement work undertaken on behalf of the Council in 2023/24.
- 6.2 The Contract Delivery Plan presented provides information on anticipated planned procurement activity as far as known for future years.

7. APPENDICES

Appendix 1 - Procurement Annual Report 2023/24
Appendix 2 - Contract Delivery Plan 2024 onwards
Appendix 3 - Tenders Accepted 2023/24
Appendix 4 - Following the Public Pound 2023/24

Authors

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Approved

Name	Designation	Date
Clare Mailer	Director (Strategy, People & Resources)	20.05.2024

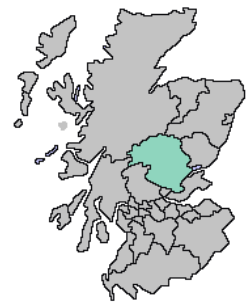
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Procurement Annual Report 2023-24



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Contents

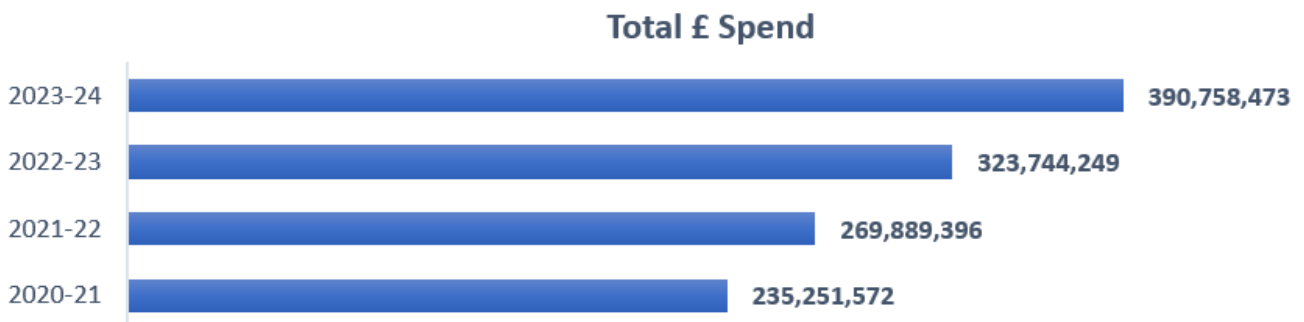
1. Introduction.....	4
2. Vision for procurement	4
3. Context	4
4. Information on Contracts	5
5. Highlights.....	7
6. Delivering Best Value.....	9
7. Reporting, Review and Benchmarking Performance.....	13
8. Strategy Ownership and Contact details	13
Appendix A – Key Statistics.....	14

The Council agreed a two year Procurement Strategy in November 2021. This report records the procurement activity for under that strategy for financial year April 2023 to March 2024. The report focusses on the variety of ways in which this activity has supported the delivery of the Council’s strategic outcomes.

The report also provides assurance that the Council’s working practices are meeting the legislative and regulatory requirements under the [Procurement Reform \(Scotland\) Act 2014](#) and associated regulations.

Council spend with third parties during 2023/24 was c£390 million. This relates to the procurement of goods, works and services, services commissioned via arm’s length organisations (ALEOs) and Tayside Contracts. The figure also includes monies allocated to support Capital investment decisions taken by the Council.

The chart below shows the total spend over the last four years. This illustrates a year on year increase in respect of spend.



1. Introduction

Given the financial challenges facing local government and the wider public sector there is a greater focus and need for procurement activity to deliver efficiencies and support new models of service delivery.

Our approved Procurement strategy recognises that effective, planned procurement is key to achieving the strategic objectives as set out in the Community and Corporate Plans for Perth and Kinross and to delivering best value.

During 2023/24 we have continued to focus on how our procurement activity supports the delivery of agreed strategic outcomes set out below and how we can secure additional social value from the way in which we work with our supply chain.

- Giving every child the best start in life
- Supporting people to lead independent, healthy and active lives
- Developing educated, responsible and informed citizens
- Creating a safe and sustainable place for future generations
- Promoting a prosperous, inclusive and sustainable economy

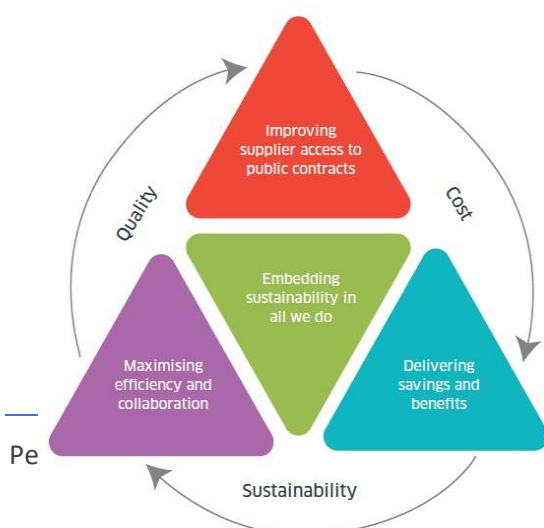
This is the final report relating to the current Procurement Strategy. A new Procurement Strategy for 2024-2029 will be presented to Full Council for approval on 26th June 2024.

2. Vision for procurement

“To achieve commercial excellence in our procurement activities and ensure that we deliver Best Value services to the communities of Perth and Kinross and do so in an effective, efficient, ethical and sustainable way that delivers local economic, environmental and social benefits.”

3. Context

Our approach to procurement is shaped by the complexity of our business and the landscape in which local government operates which provide the drivers for change that have informed our strategy. The [Scottish Model of Procurement](#), shown below, sets high level objectives for all public bodies to consider when working with supply markets and this is also reflected in our strategic approach.



- For each procurement exercise, a full assessment of the ways in which the desired contract will meet our objectives is undertaken and built into the specification issued to prospective bidders.
- Consideration is given to engagement with those affected by

the procurement exercise – this includes, as appropriate, the communities in which the contract will be delivered, the potential local supply base, and Council staff affected by the contract.

- Options for how the contract might be delivered is also considered, with a review of potential provider solutions including, arm's length organisations, supported businesses, not-for-profit organisations and smaller businesses, including start-ups.

4. Information on Contracts

Transparency and good governance are key to effective public sector procurement. Perth & Kinross Council ensures visibility to the market of opportunities to bid for public sector contracts by using the national advertising portal [Public Contracts Scotland](#). For the reporting period all Council contract opportunities with a contract value greater than £50,000 (goods and services) and £250,000 (works) are publicly advertised where there is no existing formal arrangement available. Those contract opportunities with a value lower are issued using a “Quick Quote” process through the same portal.

The legal and internal governance requirements for our procurement activity are set out in legislation and within our Contract Rules and these vary according to the value of the contract.

- Those above a [Regulatory defined threshold](#) must be **tendered** following the [Public Contracts \(Scotland\) Regulations 2015](#).
- Contracts between **£50,000 (goods & services) and £250,000 (works)** and the Regulatory threshold must follow the procurement approach as set out in [Procurement \(Scotland\) Regulations 2016](#).
- For contracts valued between **£5,000 and £50,000 (goods & Services) and £250,000 (works)** we will invite **quotations** from a minimum of 3 bidders as set out in the Council's Contract Rules.

Contracting Activity for the period

Each financial year, we publish a Contract Delivery plan derived from the budget planning process. This plan sets out, in broad terms, the intended procurement work over the reporting period, and includes some longer-term projects.

In 2023/24, the Council spent **c £390 million** with external parties.

The 2023/24 Contract Delivery Plan published in November 2023, included an anticipated **309** distinct pieces of procurement work and 340 were concluded during the reporting period. A number were in progress at the end of the financial year and the remainder are anticipated to be concluded in 2023/24. It is also worth noting that some budget commitments listed in the Contract Delivery Plan relate to contracts that can be concluded through use of existing commercial agreements – removing the requirement for the Council to carry out a full procurement exercise. One such example is Replacement Windows and Doors where a call-off was issued via an existing framework.



An overview of contracts awarded in 2023/24 is attached in Appendix B.

Local Supplier Support

In addition to our transparent approach to the publication of contract opportunities, the Council works to support and upskill local businesses to try to ensure they have the necessary skills and understanding of how best to access and be successful in public procurement exercises. The Council is an active participant in the [Supplier Development Programme](#) and hosts regular supplier support events throughout the year including a number in the local area:

Meet the Buyer events – PKC support National and Local events, attracting exhibitors from across the Tayside public sector, as well as large contractors working in the Tayside area. The events are typically attended by local SMEs and Supported businesses, generating very positive feedback, along with spin-off one to one training sessions being provided to individual delegates to assist them in bidding for future public sector opportunities. The 2024 Tayside Meet the Buyer event took place in February and was supported by the Corporate Procurement Team.

Of the suppliers registered on Public Contracts Scotland (the Scottish national contracts portal), **926** are registered as being located in Perth and Kinross, an increase from the comparative figure of **891** in 2022/23.

The Council has a policy of encouraging local businesses to bid for public sector work where possible – in the reporting period **>£84m** (21.5%) of Council spend was recorded as

being with local suppliers. This is an increase of circa £8m from 2022/23. The table below shows the total local supplier spend over the last four years.

Financial Year	Value (£)	% of total spend
2023/24	84,113,621	21.5
2022/23	76,060,652	23.5
2021/22	66,927,315	25.6
2020/21	59,070,267	22.8

Of the suppliers registered on the portal from Perth and Kinross, **94%** are defined as micro, small and medium-sized enterprises (SMEs).

The range, in terms of employee numbers, of the Perth and Kinross based businesses registered on the portal is set out in the table below.

Size of businesses in Perth and Kinross registered on PCS	
Large (over 250 employees)	55
Medium (50-249 employees)	79
Small (10-49 employees)	186
Micro (1-9 employees)	606
Total	871

Contracts Register

To improve the transparency around contracts held by the Council, we also publish a [Contracts Register](#). A searchable format of the Register can be viewed via Public Contracts Scotland website.

The search functions on Public Contracts Scotland can be used as a data source for exploring the contracting plans of a wide range of public bodies, including [Perth & Kinross Council](#). It is possible to search for specific contracts or themes and the data can also be downloaded as an Excel spreadsheet or a .csv file.

5. Highlights

The Council's Procurement Strategy and policies apply to all the Council's external expenditure on goods, services and works. The purpose of each procurement exercise carried out by the Council should be to deliver outcomes that support one or more of the Council's Corporate Plan objectives. The ways in which some of our recently awarded contracts have contributed to our objectives are described below.

Giving every child the best start in life



In the reporting period the procurement team supported the tendering of a contract for Crisis Support Services for Children and young people people, which provides support to children to ensure they can access support at times of significant distress.

Educated, responsible and informed citizens



The Council's procurement work supports this corporate objective in a variety of ways:

It **supports our Education and Children's Service** to purchase the goods materials and services needed to operate educational establishments effectively.

In 2023/24 the procurement team **delivered 585 hours of training to 179 employees**; and **received** 218 hours of training.

Prosperous, sustainable and inclusive economy



Contracts and procurement work by their nature should contribute to the economic health and socio-economic development of our localities. Throughout the period 2023/24 the procurement team has supported the development and tendering of contracts to deliver key infrastructure developments such as:

- **Cross Tay Link Road Project**

The CTLR is the biggest infrastructure project ever undertaken by Perth & Kinross Council. It will involve the construction of a new 3-span bridge over the River Tay and a six kilometre stretch of new carriageway linking the A9 and the A93 to Blairgowrie and the A94, just north of Scone. It also includes the construction of two kilometres of realigned dual carriageway on the A9 just north of the Inveralmond Roundabout.

The delivery of the CTLR is integral to the Council's development planning and transport strategies; allowing land-locked areas to be freed up for housing and

employment development as well as improving the local transport network and traffic flow and reducing journey times. From an active travel perspective, it will enhance pedestrian and cycle safety and increase network capacity. It will also significantly reduce traffic congestion and related pollution in Perth city centre.

- **Perth People Plan and Perth Transport Futures**

The Procurement Team are supporting the delivery of the broad range of [Council Capital projects](#) and programmes to ensure that we have the infrastructure in place to better serve the people of Perth and Kinross.

The team has also supported the development and delivery of contracts which are designed to improve how people experience their local environment. Examples include:

- Air Quality Monitoring and Associated Services
- MaCrosty Park Water Play
- Supply of 2 Wheeled Bins

Independent, healthy and active lives



Health and Social Care – the procurement team support the procurement of a range of social care and support services from the private and third sector to ensure that people can live safely and independently in their own homes for as long as possible.

Several contracts for the delivery of Social Care services for vulnerable individuals were awarded and implemented during 2023/2024 including Care & Support contract for Bertha Park and Dunkeld Road Projects.

Safe and sustainable place for future generations



Housing – the team have supported Housing Services with their procurement and contracting activity to make improvements to their housing stock in line with the [Strategic Housing Investment Plan](#). Examples of contracts include Central Heating Upgrade and Replacement of Chalets at Double Dykes Gypsy Traveller Site.

6. Delivering Best Value

Savings

During the reporting period we continued to see significant price increases across all categories. The utilisation of collaborative arrangements with Scottish Procurement, Scotland Excel and other contracting authorities mitigated against some of this.

The estimated savings reported by Scotland Excel for framework agreements used by Perth & Kinross Council for 2023/24 was circa **£50,000**. There is an additional cost avoidance saving through use of the Scotland Excel frameworks of around £200,000.

Rebates from collaborative organisations have not been confirmed for 2023/2024 and therefore unable to report this figure.

The use of collaborative arrangements also delivers significant non-cashable benefits in terms of time and staff resources from the Council not having to carry out their own tendering activity for these requirements.

Community Benefits in Procurement

Community Benefit clauses contribute to the delivery of the sustainable procurement objectives as set out in our Procurement Strategy.

The Council has committed to work with local communities and businesses to create a positive social impact from its contracted spend. As part of its [Sustainable Procurement Policy](#), the Council asks suppliers to work in partnership to support local communities in a real and sustainable way.

During this reporting period, **92** community benefits have been delivered. A few examples are:

Contract	Community Benefit Delivered
Replacement of Windows and Doors	Sidey Ltd employed five Modern Apprentices.
Planned Preventative & Reactive Maintenance to Public Buildings	SPIE Scotshield Ltd started a second year apprentice to work across the contract.
Children's Residential Care and Education, including Short Break, Services	Moore House School Ltd employed seven new staff from the Perth and Kinross area to create capacity for the framework.
Asbestos related Works and Services	Environmental Essentials recruited a trainee to help deliver the contract.
Mechanical & Electrical Projects to Public Buildings 2022	E.W. Edwardson provided a 4-week work experience placement.
Minor Construction Projects as Multi Trade (main) Contractors to various public buildings (non-domestic)	Hadden Construction continue to deliver work experience through Scott Street initiative. 4 candidates through Scott Street course with CSCS qualification and college bound and at least 1 into employment.

Electrical Installation Condition Reports 2021-26	BRB Electrical Ltd created two work experience placements for secondary school pupils.
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Perth High School was awarded £7,800 from the SPA Community Benefit Fund. The funding has allowed them to continue the delivery of their football programme during the construction of the new school.

The school has used football to engage pupils with their learning and maintain attendance at school. Pupils gain valuable transferrable skills such as teamwork, communication, and resilience. It engages them in after school activities, which keeps them busy and active and they have a sense of pride from their achievements.

The funding received was for the erection of full sized goal posts and pitch hire to enable school teams to take part in regional fixtures and competitions.

In December 2023, Perth High School reported that three of their footballers had been selected for the final trial for the Scottish Schoolboys team.



Great news today hearing that 3 of our [@PerthHighSchool](https://twitter.com/PerthHighSchool) footballers have been selected for the final trial for the Scottish Schoolboys team next week. Perth High has more players at this stage than any other school in Scotland! Good luck to Zak, Aaron and Jacob! 🎉👏👏👏👏 #weAREphs
pic.twitter.com/GtajqKJvkO
 07/12/2023, 13:59



Fair Working Practices

The Council is proud to be an accredited Living Wage employer since April 2016. As part of this accreditation, we made the commitment to develop our understanding of Fair Work practices, including [payment of the Living Wage](#) in our supply chain. We include questions on the approach to Fair Work when engaging with prospective suppliers for services. Where new contracts are formed, bidders are required to provide information on their approach to Fair Work and the payment of the Living Wage.

To ensure the highest standards of service quality in our contracts, we expect suppliers to commit to progressing towards adopting the seven [Fair Work First](#) criterion implemented

by the Scottish Government in 2021. These are reflected in our contract strategies and tender documents for all regulated procurements.

Electronic Tools and Process Efficiency

There is a national requirement to undertake all procurement communications with suppliers digitally. This reduces the cost of doing business for suppliers as well as for the Council, it also helps shorten payment windows and improve efficiency in managing performance.

All competitive activities use the national portal Public Contracts Scotland with the intention that potential suppliers are able to identify contracting opportunities in a single location. The use of electronic systems and digital tools to support and manage the procurement work is a source of further efficiency. Tenders are issued through an electronic platform ([PCS-Tender](#)) and all of the tenders issued are managed electronically.

We offer e-invoicing and procurement card payment options to suppliers who wish to adopt these methods.

Collaborative Contracts

During this reporting period, in addition to directly procured contracts issued on behalf of the Council, we also made use of a range of contractual agreements awarded in collaboration with other bodies.

The Council continues to make significant use of collaborative contracts which are broadly split into the following three categories:

- those delivered for the whole of the public sector by [Scottish Government](#), [Hubco](#), Westminster ([Crown Commercial Services](#)), and other public sector bodies ([Scottish Procurement Alliance](#), [SCAPE](#), [Scottish Procurement Alliance](#))
- those delivered for the Scottish local authority sector by [Scotland Excel](#)
- those delivered primarily for the three Tayside Councils through the Tayside Procurement Consortium.

TPC ceased to be resourced from June 2022. This has meant that we are unable to report on our spend channelled through these contracts due to no management information being collated. The Council does not have systems to allow us to analyse spend by contract.

Other collaborative spend includes:

Scotland Excel	£10,100,000 (this is the total spend for April 2024-Dec 2024) The total forecast spend for 23/24 is £13,900,000
Hubco	£41,937,451
Scottish Procurement Alliance	£7,229,479

Value from these collaborative arrangements is promoted through access to the enhanced buying power of working together with other Councils, either locally or nationally. Robust benchmarking of prices and costs is undertaken using data on market rates, comparable projects and internal information on performance.

7. Reporting, Review and Benchmarking Performance

Reporting

Ensuring that procurement performance is reported regularly to an appropriate committee was highlighted as an essential requirement in the [Accounts Commission Report on Procurement in Councils](#). The preparation of this Annual Report together with the reporting of procurement activity through service and financial monitoring reports is intended to meet this requirement.

Review & Benchmarking

In alternate years, an independent review of the procurement capability takes place. The Council's procurement functions are benchmarked against an assessment tool - the Procurement Capability and Improvement Programme (PCIP). The assessment requires the submission of defined range of data and documentation as well as an on-site visit by the assessors. The PCIP focuses on the policies and procedures driving procurement performance and more importantly, the results they deliver. The PCIP focusses on four main elements:

- Leadership and Governance
- Development and Tender
- Contract Management
- Purchasing Processes

. Perth and Kinross Council have decided not to participate in this years PCIP as a result of the ongoing Procurement & Commissioning Transformation project.

During the reporting period, the Procurement Team have experienced significant resource pressures. Accordingly, officers have had to prioritise ensuring legal compliance and risk management to the detriment of desired improvement activity. This is a recognised issue and measures are in hand both to provide additional internal support to the Corporate Procurement Team and to facilitate the delivery of the Strategic Commissioning and Procurement Consolidation Review.

8. Strategy Ownership and Contact details

The Council's Corporate Procurement Team is part of the Council's Legal & Governance Division in Corporate & Democratic Services, and reports to the Strategic Lead, Legal & Governance.

Contact details

Perth & Kinross Council
2 High Street
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PH1 5PH contracts@pkc.gov.uk

PERTH & KINROSS COUNCIL CONTRACT DELIVERY PLAN 2024-25

This plan sets out the anticipated known procurement activity for future years. The expected award date indicates the timescale in which we plan to issue a tender for the goods, service or works for which we need to contract.

This plan will be published on the Council website from July 2024.

It is intended that all Contracts marked with an * are collaborative contracts with at least one other Local Authority.

It is intended that all Contracts marked ** will be a call-off from an existing framework.

Delivery Plan Reference	Category	Contract	Expected Award Date
PKC10391	Council Departments	Banking Services	2025**
PKC11264	Technology	Housing Management System	2024
PKC11271	Technology	Network/Infrastructure: Supply of Telephony Services	2024
PKC11618	Technology	Citrix Estate Licence Subscription Renewal	2025
PKC11620	Technology	Northgate Contract (Software) PJB/74311 Council Tax Benefits	2026
PKC11624	Technology	Supply and Implementation of an Enterprise Architecture Solution	2024
PKC11627	Technology	Software: Annual subscription – Core Microsoft Infrastructure Systems/Tools	2024
PKC11631	Technology	NHS Circuit Rental	2024**
PKC11634	Technology	Provision of Support and Maintenance of an Identify and Access Solution (IAM solution)	2024
PKC11636	Technology	PSN DNS Services	2025**
PKC11638	Technology	Software: Application for Maintenance & Support - Corporate Reporting Tool	2024
PKC11642	Technology	Supply of Internet Connection	2025**
PKC11643	Technology	Supply of IP CCTV Communication Link for A9/A85	2025**
PKC11648	Technology	Support and Maintenance for Planning System	2026**
PKC11654	Technology	H&S Management System	2025**
PKC11940	Technology	Business Process Modeller	2024**
PKC11946	Technology	Mobile Voice and Data Services	2026**
PKC11947	Technology	Cyber Security Operations Centre (CSOC)	2026**
PKC11949	Technology	Solarwinds Maintenance	2024**
PKC11950	Technology	Small Government Enterprise Agreement for ArcGIS	2025**
PKC11951	Technology	Support and Maintenance for Storage Area Network (SAN) Solution	2026**
PKC11952	Technology	Provision of managed WAN Connectivity	2024**
PKC12303	Technology	Logotech - Hosted PSTM Maintenance	2024
PKC12362	Technology	Citrix Estate Licence Subscription Renewal (for DaaS Advanced Plus)	2024**
PKC12363	Technology	Executive Research Services	2024
PKC12365	Technology	Provision, Support and Maintenance of Anti-Virus Solution (Sophos)	2024**
PKC12366	Technology	Secure Mail Data Transfer Solution (Egress)	2024**
PKC12369	Technology	AV Support - Council Chambers	2024**

PKC12372	Technology	Website Content Management System	2025**
PKC12362	Technology	Citrix Estate Licence Subscription Renewal (for DaaS Advanced Plus)	2024**
PKC12363	Technology	Executive Research Services	2024
PKC12365	Technology	Provision, Support and Maintenance of Anti-Virus Solution (Sophos)	2024**
PKC12366	Technology	Secure Mail Data Transfer Solution (Egress)	2024**
PKC12369	Technology	AV Support - Council Chambers	2024**
PKC12372	Technology	Website Content Management System	2025**
PKC12373	Technology	Wi-Fi Network Planning & Management Toolkit (Ekahau)	2024**
PKC12645	Licensing	Unmet Taxi Demand Survey 2024	2024
Communities			
PKC11819	Fleet	Supply of 4 x Vehicle Bodies	2024**
PKC11820	Fleet	Supply of 13 x Buses	2024**
PKC11821	Fleet	Supply of 4 x 4x4 Cars	2024**
PKC11825	Fleet	Supply of 1 x 4 Axle Hooklift	2024**
PKC11826	Fleet	Supply of 1 x RCV	2024**
PKC11827	Fleet	Supply of 2 x Skip Loader	2024**
PKC11830	Fleet	Supply of 1 x Pickup	2024**
PKC11833	Fleet	Supply of 4 x Small Panel Vans	2024**
PKC11843	Fleet	Supply of 5 x Sweepers	2024**
PKC11856	Consultancy	Consultancy - Appointment of Consultants for Retrofit Assessments - Shops & Offices	2024**
PKC11857	Housing Improvements	Shops and Offices Upgrades	2024
PKC11858	Housing Improvements	Internal Upgrades to Properties at 8 St Catherine's Road and Upgrades to Closets at St Catherine's Road and High Street, Perth	2024
PKC11859	Consultancy	Consultancy - Design of Fire Alarm Replacements	2024**
PKC11860	Housing Maintenance	Fire Alarm Replacements (Works Contract)	2024
PKC11861	Consultancy	Consultancy - Appointment of Consultants for Small Capital Projects Works Delivery (Technical Support to Existing Team)	2024
PKC11871	Waste Services	Waste Analysis	2024
PKC11880	Greenspace	Seven Acres Park, Perth	2024
PKC11881	Play Areas	Muirend Park, Perth	2024
PKC11882	Play Areas	Comrie 126 Core Path	2025
PKC12105	Housing Repairs	Retrofit to Meet Energy Efficiency Standard (EESH2) Compliance	2024
PKC12109	Fleet	Supply of 6 Car Derived Vans	2025**
PKC12240	Structures & Flooding	Luncarty Flood Study	2024
PKC12241	Structures & Flooding	Kinross Surface Water Management Plan	2024
PKC12253	Fleet	Supply of 3 Hatchback Cars	2024**
PKC12254	Fleet	Supply of 1 4x4 Car	2024**
PKC12255	Fleet	Supply of 1 MPV - 7 seat	2024**
PKC12256	Fleet	Supply of 2 Artics	2024
PKC12257	Fleet	Supply of 1 Hooklift	2024
PKC12258	Fleet	Supply of 2/3 Library Vans	2024
PKC12259	Fleet	Supply of 2 RCVs	2024

PKC12260	Fleet	Supply of 3 Road Sweepers	2024
PKC12261	Fleet	Supply of 5 Tippers	2024
PKC12262	Fleet	Supply of 1 Pick-up	2024**
PKC12263	Fleet	Supply of 8 Car Derived Vans	2024
PKC12264	Fleet	Supply of 3 Pick-ups	2024
PKC12265	Fleet	Supply of 1 Panel Van	2024**
PKC12266	Fleet	Supply of 8 Panel Vans	2024
PKC12267	Fleet	Supply of 7 Small Panel Vans	2024
PKC12268	Fleet	Supply of 3 Van Derived MPV	2024
PKC12269	Fleet	Supply of 12 Tippers	2024
PKC12270	Fleet	Supply of 1 Scissor Lift	2024**
PKC12271	Fleet	Supply of 1 Telescopic Boom	2024
PKC12272	Fleet	Supply of 1 Quad	2024**
PKC12273	Fleet	Supply of 4 Agricultural Tractors	2024
PKC12274	Fleet	Supply of GM Equipment	2024**
PKC12288	Planning & Housing	Expansion of Home Energy Advice Services	2024
PKC12307	Play Areas	Potterhill Play Area	2024
PKC12308	Play Areas	Coronation Park Muthill Play Area	2024
PKC12309	Play Areas	Craigie Park Play Area	2024
PKC12325	Housing Repairs & Improvement	Housing - Domestic Windows and Doors Replacements	2024
PKC12328	Housing Repairs & Improvement	Energy Efficiency Works to Existing Housing Stock (2024/25)	2024
PKC12329	Housing Repairs & Improvement	Smoke Detector Contract for Phased Replacements	2025
PKC12332	Housing Repairs & Improvement	St Catherine's Square Regeneration Project	2024
PKC12335	Housing Repairs & Improvement	Installation of Assisted Bathing and Works in Communal Areas in Sheltered Housing	2024
PKC12336	Housing Repairs & Improvement	Window Replacements at Greyfriars Hostel, Perth	2024
PKC12339	Housing Repairs & Improvement	Room in Roof Insulation EPC Band E & F Properties	2024**
PKC12377	Public & Community Transport	Bus Shelter Cleaning	2024
PKC12409	ICT	National Shared Digital Alarm Receiving Centre	2024**
PKC12603	Repairs & Improvements	Structural Survey of Balconies	2024**
PKC12607	Structures & Flooding	RO Masonry Pack 2	2024
PKC12628	Structures & Flooding	River Garry RW 1-4	2024
PKC12629	Structures & Flooding	JM Capital Repair Pack 23/24	2024
PKC12631	Structures & Flooding	JM Capital Repair Pack 23/24	2024
PKC12672	Waste	Organics - Commingled Food & Garden Waste	2025**

PKC12673	Waste	Organics - Green Waste	2025**
PKC12674	Waste	Organics - Food Waste	2025**
PKC12676	Waste	Operational Asset Management Feasibility Studies	2024**
PKC12677	Waste	Processing of Mixed Glass	2024**
PKC12680	Housing Repairs & Improvements	Housing Repairs Ad-Hoc Joiner Work	2024
PKC12681	Consultancy	Feasibility Study for Energy Efficiency Upgrades/Replacements of Chalets at Bobbin Mill, Pitlochry	2024**
PKC12682	Repairs & Improvements	Bathroom Adaptations Contract (Multi-Year Contract)	2024
PKC12683	Repairs & Improvements	Rannoch Road Flats - Mop Up of Internal Works	2024
PKC12684	Repairs & Improvements	Rannoch Road Flats - External Stair Works	2024
PKC12685	Repairs & Improvements	Retrofit Programme - Multiple Properties throughout Perth & Kinross (Multiple Years)	2024
PKC12686	Repairs & Improvements	Replacement Kitchen Programme (Multiple Years)	2024
PKC12687	Repairs & Improvements	Replacement Bathroom Programme (Multiple Years)	2024
PKC12688	Repairs & Improvements	Registration of Energy Performance Certificates	2024**
PKC12689	Repairs & Improvements	Energy Efficiency Works to Existing Housing Stock (2025/26)	2024
PKC12690	Consultancy	St Catherine's Square Regeneration Project (Consultancy Works)	2024**
PKC12691	Structures & Flooding	Moncrieffe Causeway Repair Works 2024	2024
PKC12702	Fleet	Plant Equipment, Volvo Excavator	2024
PKC12703	Structures & Flooding	Craigie Burn (Perth) Sediment Managements Works	2024
PKC12705	Consultancy	Employers Agent	2024
PKC12707	Construction	Beechgrove New Build Housing Construction	2024
PKC12708	Construction	Balhousie New Build Housing Construction	2024
PKC12709	Construction	EV Infrastructure Fund Project	2024
PKC12710	Consultancy	Transport Modelling	2024
PKC12711	Consultancy	West Kinfauns P&C Design/Technical Work	2024
PKC12712	Consultancy	Traffic Data Gathering	2024
PKC12713	Consultancy	Parking Survey	2024
PKC12714	Consultancy	20 Minute Neighbourhood & Local Living Analysis	2024
PKC12716	Consultancy	LNCS Survey Work	2024
PKC12717	Consultancy	Local Landscape Area Review	2024
PKC12718	Consultancy	Landscape Sensitivity Studies	2024
PKC12719	Consultancy	Audit of Transport Infrastructure	2024
PKC12733	Consultancy	Blairgowrie Land Contamination Consultancy	2024**
PKC12734	Fleet	Skips	2024**
PKC12735	Fleet	Skip Loader & 12 Tonne Tipper	2024
PKC12736	Fleet	Waste Disposal Excavator - Material Handler	2024**
PKC12739	Fleet	Pressure Washer Maintenance	2024

PKC12741	Fleet	Used Ride on Mower to Replace CG1902	2024
PKC12743	Fleet	Maintenance of Pressure Washers	2024
PKC12744	Technology	Parking System	2024
PKC12748	Roads	Cycling Scotland Grant Project	2024
PKC12750	Public Transport	PSV Contract XPH/004	2024
PKC12751	Fleet	7 x 8 Seater Vehicles	2024**
PKC12753	Fleet	Vehicles Under 3.5 Tonnes	2024
PKC12754	Fleet	Skips	2024**
PKC12761	Fleet	Vehicles Over 3.5 Tonnes	2024
PKC12762	Fleet	1 x 8 Seater Electric Vehicle	2024**
PKC12763	Fleet	1 x 7 Seater Vehicle	2024**
PKC12764	Fleet	Additional Vehicles for Waste Disposal	2024
PKC12766	Fleet	12 Tonne Caged Tipper	2024**
PKC12768	Repairs & Improvements	Service, Inspection and Maintenance of Fire Safety Systems	2024
PKC12769	Consultancy	Contaminated Land	2024
PKC12770	Consultancy	Aberuthven Bridge Coring	2024
PKC12771	Greener Living	Air Quality - Continuous Monitoring	2024**
PKC12774	Fleet	Mini-Digger	2024
PKC12775	Roads & Pavements	First Time and Emergency Repairs to Potholes on the Road and Footway Network	2024
PKC12779	Servicing	Fire Engineers Perth High School	2024
PKC12780	Consultancy	Development Control Consultant	2024**
PKC12783	Vehicle Management	8 Seater Cars February 2024	2024**
PKC12784	Technology	BIM Collaborative Pro Subscriptions	2024**
PKC12789	Technology	PKCCC Website	2024
PKC12791	Waste Services	General Waste Composition Analysis	2024
PKC12809	Repairs & Improvements	Environmental Improvements Contract Phase 3	2024**
Education & Childrens Services			
PKC12432	Education	Fresh Fruit and Vegetables	2024
PKC12661	Education	Community Childminding	2024
PKC12663	Education	Triple P Resources	2026
PKC12664	Education	Dining Table Maintenance	2025
PKC12665	Education	Online School Payments & Cashless Catering	2025**
PKC12666	Education	Counselling in Schools	2025*
PKC12669	Education	Crisis Support	2025
PKC12670	Education	Advocacy Services	2024
PKC12671	Education	CALL Scotland	2025
PKC12725	Technology	Laser Cutting/Engraving Machines	2024
PKC12729	Education	Supporting Families with School Attendance	2024
PKC12773	Education	Assisted Hearing Equipment	2024
Health & Social Care Partnership			
PKC11905	Social Care	Floating Housing Support	2025
PKC12426	Social Care	Care and Support	2024
PKC12429	Social Care	Secure Care	2024



**TENDERS ACCEPTED
1 April 2023 to 31 March 2024**

The Council Scheme of Administration sets out the arrangement for the management of the procurement function.

The information provided below sets out for the committee all the tenders accepted on behalf on the Council during the financial year 2023/24.

Contact information is given in each section of this report; queries in respect of specific tendering activities should be raised with the named officers directly.

Please note where a contract value is a negative value, this is an income generating contract and there is no cost to PKC in the delivery of this contract.

Tenders Accepted by Council Services (To 31 March 2024)

Corporate and Democratic Services				
Tenders for goods, supplies and services or works where the higher value regulated procurement threshold. (The Public Contracts (Scotland) Regulations 2015) has been applied				
Title	Value (£)	Start	End	Incl. Extension
No tenders of this type were accepted by Corporate and Democratic Services.				

Tenders above £50k and below the higher value regulated procurement threshold, where the Procurement Reform (Scotland) Act 2014 has been applied				
Title	Value (£)	Start	End	Incl. Extension
Social Services (Children and Young People) Modern Apprenticeship Delivery	33,696	01/02/2024	01/05/2025	01/11/2027
Tender for Business and Administration Modern Apprenticeship Delivery	38,955	23/08/2023	23/08/2024	23/08/2026

Three Competitive Quotes / Quick Quote				
Title	Value (£)	Start	End	Incl. Extension
Social Care International Recruitment Agency Support	15,000	20/11/2023	31/03/2024	
Professional Design Services for Murray Fountain Restoration	22,800	10/07/2023	31/03/2025	
Case Management Solution for FOI, EIR	35,600	01/06/2023	31/05/2026	31/05/2029
Uplift of confidential waste for secure shredding and disposal	32,820	01/04/2023	31/03/2025	31/03/2027

Transparency Notices				
Title	Value (£)	Start	End	Incl. Extension
Provision of Driver Medicals	66,750	01/11/2023	31/10/2026	
Insurance Services for Perth and Kinross Council	14,600,000	01/10/2023	30/09/2026	30/09/2031
Working Smarter: City Centre Office Accommodation Spatial Planning	22,237	22/01/2024	31/03/2024	
Maintenance and Support Services for the Council's Firewall	202,835	24/04/2023	23/04/2028	
Print and Post of Council tax bills	384,000	02/10/2023	01/10/2025	01/10/2027
Perth Grammar School - Replace Structural Roof & Roof Covering	530,000	03/04/2023	04/12/2023	
Supply of 1 Server	5,032	15/06/2023	16/06/2030	
Secure Email Gateway	35,670	01/12/2023	30/11/2024	
Server Estate Update	19,301	02/12/2023	07/12/2030	
Valuation of Housing Revenue Account (HRA) Assets	49,000	08/01/2024	08/01/2025	08/01/2029
Jira Subscription and Support	3,049	30/05/2023	30/05/2024	
Location Centre Subscription	8,000	01/11/2023	01/02/2024	
Maintenance & Support Services for LAN Equipment	704,458	01/04/2023	31/03/2028	31/03/2030
Govroam membership	15,164	27/02/2023	26/02/2026	26/02/2027
UPS Support and Maintenance	55,201	16/11/2023	15/11/2028	
Learning & Development Authoring Tool	2,420	07/09/2023	07/09/2025	

Mobile Device Management Software	36,578	08/12/2023	08/12/2024	08/12/2025
Employee Benefits	1	31/03/2023	30/03/2026	30/03/2030
Social Care System Power BI/Reporting Proof of Concept	40,000	26/06/2023	26/06/2025	
IoT LoRaWAN - Supply & implementation of extended coverage	125,000	16/06/2023	30/06/2024	30/06/2027
BIM Collaborate Pro subscriptions	13,821	10/05/2023	10/05/2024	
Servicing and Maintenance of Zip Taps	73,334	01/04/2024	01/04/2027	01/04/2028
Investment Management for the Charitable Fund and Educational Trust	54,000	01/11/2023	31/10/2026	31/10/2027
Methven PS - New Build Sports/Dining Hall	42,940	05/02/2024	27/08/2027	
Letham PS and Westbank Depot - Eco Hubs	74,000	15/04/2024	23/05/2024	
Maintenance of Gazetteer Management Solutions	10,576	01/04/2024	31/03/2025	
Citrix Estate Licence Subscriptions	16,253	05/04/2024	04/04/2025	
Provision of anti-virus solution licences	21,174	06/04/2024	05/04/2025	
Secure mail data transfer solution	5,788	24/03/2024	23/03/2025	
Technical Support for AV Equipment installed in PKC Council Chambers	18,564	01/04/2024	01/07/2025	01/07/2027
Wi-Fi Network Planning and Management Toolkit	1,714	02/03/2024	01/03/2025	
Provision of an audio-visual system for Perth Crematorium	35,688	09/02/2024	09/02/2026	09/02/2027

For further information contact: Lynn Law lynnlaw@pkc.gov.uk 01738 475550

Education and Children's Services

Tenders for goods, supplies and services or works where the higher value regulated procurement threshold (The Public Contracts (Scotland) Regulations 2015) has been applied

Title	Value (£)	Start	End	Incl. Extension
Crisis Support Services for children and young people within Perth and Kinross	288,000	19/12/2023	15/12/2025	15/12/2027

Tenders above £50k and below the higher value regulated procurement threshold, where the Procurement Reform (Scotland) Act 2014 has been applied

Title	Value (£)	Start	End	Incl. Extension
No tenders of this type were accepted by Education and Children's Services				

Light Touch Regime

Title	Value (£)	Start	End	Incl. Extension
Provision of Youth Services throughout Perth and Kinross Council Area	1,755,525	01/04/2024	01/04/2027	01/04/2029

Three Competitive Quotes / Quick Quote

Title	Value (£)	Start	End	Incl. Extension
Habilitation service provision within Perth and Kinross	28,357	01/11/2023	31/10/2026	
Youth Worker for EAL Team, Perth and Kinross Council	45,000	15/11/2023	14/11/2024	
Play on Pedals Resources	5,500	31/05/2023	01/06/2023	
Mindfulness in Early Learning & Childcare	13,600	14/02/2024	13/02/2025	
Secondary School Staff Support Services	45,000	16/08/2023	27/06/2024	
Play on Pedals Resources	6,679	16/02/2024	17/02/2024	26/03/2024
Supporting Families with School Attendance in Perth & Kinross	39,992	04/03/2024	03/03/2025	

Transparency Notices

Title	Value (£)	Start	End	Incl. Extension
Outdoor play equipment at the Craigie Primary School	15,379	28/04/2023	31/07/2023	
Outdoor play equipment at the Royal School of Dunkeld	15,000	28/04/2023	31/07/2023	
Outdoor play equipment at Fairview School	32,752	30/08/2023	20/10/2023	
Seesaw Subscription	69,131	22/05/2023	22/05/2024	
Group Youth Work in Schools	12,824	17/04/2023	31/10/2023	
Group Work in Schools - Mindspace	6,000	08/01/2024	27/06/2024	
Group Youth Work in Schools - Lifelink	6,000	10/01/2024	27/06/2024	
Child Impact Assessment Implementation Project	42,789	30/01/2024	30/11/2024	

For further information contact: Andy Cook acook@pkc.gov.uk 01738 476330

Health and Social Care Partnership				
Tenders for goods, supplies and services or works where the higher value regulated procurement threshold (The Public Contracts (Scotland) Regulations 2015) has been applied				
Title	Value (£)	Start	End	Incl. Extension
No tenders of this type were accepted by Health and Social Care Partnership during this period				

Tenders above £50k and below the higher value regulated procurement threshold, where the Procurement Reform (Scotland) Act 2014 has been applied				
Title	Value (£)	Start	End	Incl. Extension
No tenders of this type were accepted by Health and Social Care Partnership during this period				

Light Touch Regime				
Title	Value (£)	Start	End	Incl. Extension
The Provision of Social Care and Housing Support for Individuals Living at The Bertha Park Project	3,710,632	Start date to be confirmed	01/12/2026	01/12/2028

Three Competitive Quotes / Quick Quote				
Title	Value (£)	Start	End	Incl. Extension
No tenders of this type were accepted by Health and Social Care Partnership during this period				

Transparency Notices				
Title	Value (£)	Start	End	Incl. Extension
Dunkeld Road Project	1,455,000	Start date to be confirmed	31/10/2026	31/10/2028

For further information contact: Amanda McKinnie AMcKinnie@pkc.gov.uk 01738 476789

Communities

Tenders for goods, supplies and services or works where the higher value regulated procurement threshold (The Public Contracts (Scotland) Regulations 2015) has been applied

Title	Value (£)	Start	End	Incl. Extension
Residual Waste Treatment Perth & Kinross Council	71,600,000	01/08/2023	01/08/2033	01/08/2038
Intensive Housing Support Service Pilot in the Perth and Kinross Council Area	280,000	16/10/2023	16/10/2025	16/10/2026
Managed Service for Term Operational Resource	12,000,000	01/12/2023	01/12/2026	01/12/2029
Air Quality Monitoring and Associated Services	208,900	19/02/2024	19/02/2026	19/02/2028

Tenders above £50k and below the higher value regulated procurement threshold, where the Procurement Reform (Scotland) Act 2014 has been applied

Title	Value (£)	Start	End	Incl. Extension
Perth City and Towns Web Content and Marketing	80,000	01/11/2023	01/11/2024	01/11/2027
A93/03 Queen's Bridge Concrete Repairs and Remedial Works	216,575	08/12/2023	08/04/2024	08/06/2024
Processing of Mixed Paper and Cardboard and Hire of Cardboard Compactors	2,500,000 (Income Generating)	01/11/2023	01/11/2026	01/11/2028
Scour Assessments Pack S2	280,653	29/01/2024	29/10/2024	

Three Competitive Quotes / Quick Quote

Title	Value (£)	Start	End	Incl. Extension
Auchterarder Festive Decorative Lighting	21,800	15/08/2023	20/10/2023	
Perth City Design and Development Guide Perth & Kinross Council	42,351	17/11/2023	29/03/2024	
Supply of one 18 tonne box or curtain side vehicle	32,500	14/09/2023	15/09/2023	
Telehandlers Repair & Maintenance	12,580	20/06/2023	19/06/2025	
B8079/05 Bridge of Tilt Temporary Scour Repair	71,994	22/09/2023	14/12/2024	
C465/02 Coul Scour Repair	45,648	25/08/2023	16/10/2024	
Processing of Mixed Paper and Cardboard	-7,000 (Income Generating)	28/06/2023	31/10/2023	
140L Food Waste Bin Housings	39,000	03/10/2023	30/11/2023	
Biodiversity Consultant	12,000	01/10/2023	31/03/2024	
Craigie Burn Sediment Management Works	39,248	05/02/2024	31/03/2024	
A91-01 Devon Parapet Repair	40,571	22/01/2024	01/03/2024	
A923 Boatlands Retaining Wall Repairs	34,430	19/06/2023	14/07/2023	
Tay Forest National Park Bid Consultancy Support	26,438	06/10/2023	04/10/2024	
Property refurbishment Allt Mor Crescent, Kinloch Rannoch	16,558	04/09/2023	29/09/2023	
Property refurbishment Denpark Abernethy	20,722	04/09/2023	29/09/2023	
Property refurbishment Crofnappoch Place Crieff	13,847	04/09/2023	29/09/2023	
Property refurbishment Newton Place, Hillyland	16,044	11/09/2023	29/09/2023	
Property refurbishment Logie Crescent, Letham	11,473	11/09/2023	29/09/2023	
Property refurbishment County Place Stanley	22,270	11/09/2023	29/09/2023	

Property refurbishment Tweedsmuir Rd Letham	17,722	25/09/2023	13/10/2023	
Property refurbishment Den Park Abernethy	18,222	04/12/2023	12/01/2024	
Property refurbishment Tweedsmuir Rd, Perth	22,647	04/12/2023	12/01/2024	
Property refurbishment Monteath Street, Crieff	18,920	04/12/2023	12/01/2024	
Property refurbishment Shielhill Place, Stanley	19,084	30/05/2023	27/06/2023	
Property refurbishment Pullar Terrace, Hillyland	12,185	04/09/2023	29/09/2023	
Property refurbishment Burnside Road Balbeggie	21,820	04/12/2023	12/01/2024	
Commercial Agents Food and Drink Park	22,950	13/11/2023	12/11/2025	
Street Weed Contract	74,500	09/05/2023	18/08/2023	
Sports Conveyance Contracts	15,250	17/04/2023	30/06/2023	
Proposed Extension to Property on Douglas Road, Scone	72,736	21/09/2023	31/03/2024	
Masonry Pack 1	48,189	09/11/2023	15/03/2024	
PHV/Taxi Contracts	10,660	19/02/2024	31/03/2024	
Parking Bay Remedial Works, Rorrie Terrace, Methven	28,183	14/08/2023	31/01/2024	
Property refurbishment Stormont House Perth	24,708	26/06/2023	26/07/2023	
Property refurbishment Gray Street, Perth	24,079	10/07/2023	04/08/2023	
Property refurbishment Lumsden Crescent, Almondbank	29,730	16/10/2023	21/12/2023	
Property refurbishment Glenalmond Terrace, Perth	11,348	08/01/2024	15/03/2024	
Property refurbishment North Methven Street, Perth	26,428	23/10/2023	15/03/2024	
Property refurbishment Milne Court, Perth	22,478	26/06/2023	10/08/2023	
Property refurbishment of Maxtone Terrace, Gilmerton	17,038	28/08/2023	14/11/2023	
Property refurbishment to Denpark, Abernethy	16,574	07/08/2023	19/10/2023	
Property refurbishment Church Lane, Errol	22,650	26/06/2023	08/08/2023	
Property refurbishment South Inch Terrace, Perth	22,360	03/07/2023	06/09/2023	
Property refurbishment Potterhill Gardens, Perth	24,933	03/07/2023	20/09/2023	
Property refurbishment Drummond Crescent, Perth	19,565	23/10/2023	21/11/2023	
Property refurbishment Stanley Crescent, Perth	16,040	23/10/2023	11/12/2023	
Property refurbishment Park Terrace, Scone	10,765	08/01/2024	29/02/2024	
Outdoor Bin Storage Units	30,000	29/01/2024	31/03/2024	
Supply and Installations of Two Static Hot Pressure Washers	15,180	01/02/2024	31/01/2025	
Primary School Cycle Parking	18,801	28/11/2023	12/01/2024	
Primary School Cycle Parking	6,270	03/01/2024	14/02/2024	
Scotland's Tay Country Project Manager	15,000	30/09/2023	01/10/2024	
Property refurbishment Kingswell Terrace, Perth	22,172	12/02/2024	08/03/2024	
Property Refurbishment Dunsinane Drive, Letham	17,105	12/02/2024	08/03/2024	
Property refurbishment Sillerburn Road, Kirkmichael	21,300	27/02/2024	26/03/2024	
Property refurbishment Inchewan, Birnam	12,650	27/02/2024	26/03/2024	
Taxi/PHV Contract	8,640	08/01/2024	27/06/2024	
Energy Performance Certificates	48,000	22/05/2023	31/12/2023	
Supply & Delivery of Wayfinding Finger Arm Posts	15,998	24/01/2024	25/01/2024	
Macrosty water play	32,000	22/02/2024	23/02/2024	
Capacity Building Programme for Local Communities	19,800	15/02/2024	30/09/2024	
Masonry Repair Pack 2	29,837	19/04/2024	14/06/2024	
Supply of one Used Golf Fairway Mower	25,000	11/01/2024	12/01/2024	

Transparency Notices				
Title	Value (£)	Start	End	Incl. Extension
Smoke Detector Upgrades to Properties in Perth and Kinross	390,770	03/08/2023	30/04/2024	
Target Customers Occupiers and Properties Services	24,964	03/01/2024	31/03/2024	
Sweeper Repair & Maintenance Contract	81,396	29/09/2023	28/09/2028	
Supply of 7.5T Caged Tipper	96,850	19/07/2023	20/07/2023	
Supply of 1 medium car	28,230	27/11/2023	28/11/2023	
Purchase of Skip Containers	41,335	21/07/2023	22/07/2023	
Supply and Delivery 40 cuyd Compaction Containers	61,465	23/11/2023	24/11/2023	
Specialist support to carry out scope 3 emissions analysis for Perth & Kinross	9,995	12/06/2023	11/10/2023	
Digital Inclusion 2023	200,000	03/07/2023	31/03/2025	
The Angel's Share	10,000	01/09/2023	31/03/2024	
Internal refurbishment of 4 properties within Letham, Perth	80,448	30/05/2023	11/07/2023	
Surface Installation	10,317	24/07/2023	31/08/2023	
Tenant Satisfaction Survey	80,000	10/07/2023	31/03/2025	
Plastics, Cans & Cartons Processing	0 (Income Generating)	01/11/2023	31/10/2026	
Central Heating Upgrade Phase 5	3,911,150	02/10/2023	30/09/2026	
Options Assessment	28,139	21/12/2023	31/03/2024	
Development Control Works Package	45,000	05/06/2023	05/06/2026	
Supply of 1 Lease Car	12,461	11/03/2024	11/03/2027	
Supply of 1 Lease Car	10,269	08/07/2024	08/07/2027	
Supply of 1 Lease Car	11,582	18/01/2024	17/01/2027	
Supply of 1 Lease Car	17,046	25/03/2024	25/03/2027	
Supply of 1 Lease Car	11,134	27/10/2023	26/10/2026	
Supply of 1 Lease Car	10,374	15/04/2024	15/04/2027	
Supply of 1 Lease Car	13,102	11/01/2024	10/01/2027	
Supply of 5 x Ride on Zero-Turn Mowers	18,666	06/02/2024	07/02/2024	
Disposal of Inert Waste	470,000	16/12/2023	15/12/2025	15/12/2028
Treatment and Disposal of Used Tyres	61,000	01/08/2023	01/08/2025	01/08/2027
Pavement Parking Survey	63,000	26/06/2023	26/06/2024	
Replacement of 20 Chalets at Double Dykes Gypsy Travellers Site	5,983,224	15/01/2024	31/03/2025	30/09/2025
C414/04 C05 Culteuchar Culvert Replacement	234,980	31/03/2023	04/01/2024	04/01/2025
Uplift and Re-processing of Plasterboard	80,000	25/09/2023	24/09/2027	24/09/2029
Roads Infrastructure & Greenspace Asset Management Software	279,840	28/04/2023	28/04/2026	28/04/2027
23/24 Principal Bridge Inspections	144,869	29/08/2023	29/03/2024	
22/23 Principal Bridge Inspections	118,812	15/05/2023	15/09/2023	
U231 Killoch Burn Culvert Temporary Bridge	63,361	15/06/2023	15/06/2024	15/07/2024
Air Quality RTM Move	2,000	31/08/2023	08/09/2023	
Clean Air Day 2022	7,999	30/05/2023	30/08/2023	
Westbank Depot Polytunnel Refurbishment	8,344	16/08/2023	16/10/2023	
Westbank Polytunnel Refurbishment (installation)	9,750	16/08/2023	16/10/2023	
National Assistance Funeral Service	20,000	20/12/2023	31/03/2024	

Supply of 2 Wheeled Bins	1,420,710	03/07/2023	03/11/2023	
Distribution of Wheeled Bins	129,421	31/07/2023	30/11/2023	
Waste Asset Management Review	44,500	01/08/2023	31/03/2024	
ECO Stars Fleet Recognition Scheme	12,200	30/05/2023	31/03/2024	
Crieff Revocation Detailed Assessment	8,950	12/10/2023	31/03/2024	
Retrofit Potterhill, Pomarium, Market, Milne and Lickley Court in Perth	572,222	19/06/2023	19/06/2024	
Demolition of Former Quality Café and Clachan Bar, Perth	241,560	23/08/2023	22/03/2024	
Crieff Comrie Core Path	18,535	09/01/2024	31/03/2024	
Purchase of 3 Paper and Cardboard Compactors	58,131	26/01/2024	27/01/2024	
Employers Agent and Quantity Surveyor Services for the Multi-Storey Refurbishment Works	84,481	04/03/2024	04/03/2030	
Transport Contracts operated by Public Service Vehicles Q1 2023	32,470,932	01/04/2023	31/03/2028	30/06/2028
Transport Contracts operated by Public Service Vehicles Q1 2023	597,038	17/04/2023	03/04/2026	03/07/2026
Transport Contracts operated by Public Service Vehicles Q2 2023	42,571	17/04/2023	17/07/2023	
Transport Contracts operated by Public Service Vehicles Q2 2023	1,779,813	16/08/2023	16/04/2026	16/04/2029
Transport Contracts operated by Taxis and Private Hire Vehicles (Q2 2023)	8,927,936	31/07/2023	02/08/2026	02/08/2029
Transport Contracts operated by Taxis and Private Hire Vehicles Q3 2023 #2	1,145,773	31/07/2023	02/08/2026	02/08/2029
Transport Contracts operated by Taxis and Private Hire Vehicles Q3 2023 #3	211,893	18/09/2023	02/08/2026	02/08/2029
Transport Contracts operated by Taxis and Private Hire Vehicles Q4 2023	36,100	08/01/2024	02/08/2026	02/08/2028
PSV Contract XPH/003	35,600	05/02/2024	05/07/2024	
Transport Contracts operated by Taxis and Private Hire Vehicles Q3 2023 #1	3,087,523	31/07/2023	02/08/2026	02/08/2029
Transport Contracts operated by Public Service Vehicles Q3 2023	102,120	16/08/2023	16/07/2024	
Taxi Contract ABG/010	7,630	08/01/2024	27/06/2024	
Supply and Delivery of Various Skips	33,111	08/02/2024	09/02/2024	
Supply and Delivery of Skip Containers	38,296	11/03/2024	12/03/2024	
EV Infrastructure 2023/24	268,669	14/03/2024	15/03/2024	
External Fabric Contract Phase 7 2024/27	5,681,568	22/04/2024	21/04/2027	
Good Food Strategy and Partnership Development Support for Perth and Kinross	14,070	22/02/2024	23/02/2024	

For further information contact: Shona Welsh swelsh@pkc.gov.uk 01738 476417

Appendix 4 – Following the Public Pound Report 2023/24

FOLLOWING THE PUBLIC POUND 1 April 2023 to 31 March 2024

‘Following the Public Pound’ means ensuring that there is proper accountability for public funds used in delivering services and providing social benefits, irrespective of the means of delivering them. Each Director of Council Services is responsible for ensuring that there is clear public accountability for public funds which are provided from their budgets to outside organisations.

In common with other local authorities, the Council works with a number of external organisations to assist in the provision of its services. These external organisations include public, private and voluntary sector providers.

The Council has a local Code of Guidance based on the Code of Guidance on Funding External Bodies and Following the Public Pound issued by the Accounts Commission in co-operation with COSLA.

Queries in respect of specific activities should be raised via contracts@pkc.gov.uk

ALEO Analysis

Organisation Name	CDS	COM	ECS	HSCP	Total
Culture Perth & Kinross (Charity)	27,846	3,927,100	809		3,955,755
Culture Perth & Kinross (Trading)	18,803	583	3,177		22,563
Horsecross Trading Ltd	3,112	608	4,628		8,348
Perth Theatre & Concert Hall (previously Horsecross Arts)			361		361
Live Active Leisure	1,184,836	3,135,966	997,627	123,380	5,441,809
Live Active Leisure Ltd			862,024		862,024
Scottish Police Authority		4,865	15,594		20,459
Tayside Contracts (breakdown below)	894,744	20,110,641	14,221,012	528,728	35,755,125
ALEO Grand Total	2,129,341	27,179,763	16,105,232	652,108	46,066,444

Tayside Contracts Analysis

Description	CDS	COM	ECS	HSCP	Total
Catering	266	2132	7,861,980	7,213	7,871,591
Cleaning	352,627	163,824	6,020,690	41,287	6,578,428
Liquid Fuel	6,462	239,044	1,492	16,659	263,657
Rent		27,911			27,911
Roads		19,305,625			19,305,625
Sanitary		37,250	5,473		42,723
Signage		136,223			136,223
Street Lighting		609,746			609,746
Other	229,357	292,986	398,670		921,013
Tayside Contracts Total	588,712	20,814,741	14,288,305	65,159	35,756,917

External Organisation Analysis

CECF: Community Environment Challenge Fund
 CIF: Community Investment Fund
 GFG: Good Food Grant

GLF: Green Living Fund
 SLA: Service Level Agreement
 WWF: Warm Welcome Fund

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
54th Perthshire Scout Group	CIF Ward 7		13,411			13,411
66th Perthshire Scout Group	CIF Ward 9		1,750			1,750
Aberfeldy Development Trust	CAT Enablement Fund		5,160			5,160
Aberlour Child Care Trust	SLA 2023/24			125,775		125,775
Aberlour Children's Charity	GFG		2,000			2,000
Abernethy Pavilion	Administration Grant		250			250
Aberuthven & Dunning Parish Church	WWF Grant		2,030			2,030
Aberuthven Village Hall	Administration Grant		250			250
Aberuthven Village Hall Trust	CIF Ward 7		2,880			2,880
	WWF Grant		2,300			2,300
Aero Space Kinross	CIF Ward 8		5,000			5,000
	WWF Grant		400			400
All Strong Scotland	CIF Ward 12		6,900			6,900
	WWF Grant		1,200			1,200
Alyth & District 50 Plus Club	WWF Grant		932			932
Alyth Development Trust	CIF Ward 2		7,494			7,494
Alyth Halls Association	WWF Grant		1,607			1,607
Alyth Path Network	Path Administration Grant		150			150
Alyth Seniors Lunch Club	WWF Grant		1,400			1,400
Alyth Youth Partnership	WWF Grant		2,107			2,107
Alzheimer Scotland	Daycare activities in Pitlochry				6,813	6,813
Amulree Village Hall Trust Fund	Life Learn Management		250			250
Anchor House	Housing Support Payments		141,801			141,801
Ardoch Parish Church	WWF Grant		1,710			1,710
Ark Housing Association	Housing Support Payments		369,962			369,962
Arngask Hall	Administration Grant		250			250
Atholl Centre	WWF Grant		1,650			1,650
Auchterarder & Aberuthven Connected	WWF Grant		7,710			7,710
Auchterarder Community Bus Group	GLF Strathearn/Strathallan LAP		10,000			10,000
Auchterarder Community Sports & Recreation	CIF Ward 7		6,477			6,477
	Path Administration Grant		150			150
Auchterarder Curling Club	CIF Ward 7		1,600			1,600
Auchterarder Men's Shed	CIF Ward 7		1,200			1,200
	WWF Grant		400			400
Ballintuim Village Hall	Administration Grant		250			250
	CIF Ward 3		2,450			2,450
Bankfoot Cuppa & Company	WWF Grant		1,050			1,050
Bankfoot Foodshare Pantry	GLF Strathtay LAP		20,312			20,312
	Strathtay LAP		10,156			10,156
Barnardo's Scotland	SLA 2023/24			33,500		33,500

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Beautiful Perth	CECF		10,000			10,000
Bertha Park Community Group	CIF Ward 5		5,626			5,626
	WWF Grant		3,498			3,498
Bertha Park Residents	CIF Ward 5		3,671			3,671
Bethany Christian Trust	WWF Grant		880			880
Beyond Adventure	Outreach			7,500		7,500
Biodiversity Blair	GLF Eastern Perthshire LAP		340			340
Birnam Arts	WWF Grant		1,772			1,772
Blackford Parish Church	WWF Grant		1,045			1,045
Blackwater Village Hall	Administration Grant		250			250
Blair Atholl Village Hall	Administration Grant		250			250
Blairgowrie and Rattray Access Network	CECF		1,500			1,500
	CIF Ward 3		915			915
	Path Administration Grant		150			150
Blairgowrie and Rattray Community Trust	CIF Ward 3		5,901			5,901
Blairgowrie and Rattray Development Trust	GLF Eastern Perthshire LAP		3,433			3,433
	WWF Grant		1,930			1,930
Bob's Brew	Perth City LAP		200			200
Breadalbane Men's Shed	CIF Ward 4		1,000			1,000
Breadalbane Reading Rooms	WWF Grant		3,091			3,091
Breadalbane Snug Hug	GFG		900			900
Bridge of Cally Village Hall	Administration Grant		250			250
	WWF Grant		1,610			1,610
Bridge of Earn Amateur Football Club	CIF Ward 9		4,000			4,000
Bridge of Earn Institute	Administration Grant		250			250
Bridgend Gannochy & Kinnoull Community Council	WWF Grant		2,500			2,500
Broke Not Broken	CIF Ward 8		4,800			4,800
	GLF Kinross-shire LAP		8,162			8,162
	WWF Grant		8,900			8,900
Bullionfield Recreation Club	CIF Ward 1		1,378			1,378
Burrelton Community Hub	WWF Grant		1,307			1,307
Butterstone Hall	Administration Grant		250			250
Caledonia Housing Association	Burnside Court		16,879			16,879
	Housing Support Payments		131,357			131,357
	Muirmont Place		598			598
	South William Street		13,249			13,249
Camserney Hall	Administration Grant		250			250
CANdo Magazine	CIF Ward 2		1,200			1,200
Caputh Village Hall	Administration Grant		250			250
Carnbo Hall	Administration Grant		250			250
Carnbo & District Community Hall Association	CIF Ward 8		2,000			2,000
	WWF Grant		330			330
Carse of Gowrie Group	CIF Ward 1		1,080			1,080
Carse Voices	CIF Ward 1		647			647
Cath RSI	Housing Support Payments		551,837			551,837

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Centre For Inclusive Living P & K	SLA 2023/24				45,852	45,852
Centrum Edukacyjne Bajka	CIF Ward 12		3,000			3,000
	WWF Grant		3,000			3,000
Chapelhill Hall	Administration Grant		250			250
Checkin	SLA 2023/24				31,196	31,196
Children's Hospices Across Scotland	SLA 2023/24			19,907		19,907
Churches Action for The Homeless	CIF Ward 12		6,000			6,000
	GLF Perth City LAP		11,744			11,744
	SLA 2023/24		270,676			270,676
Cleish Village Hall	Life Learn Management		250			250
Climate Cafe Hub	GLF Strathtay LAP		5,390			5,390
Clunie Public Hall	Administration Grant		250			250
Comrie Cinema and Events Club	CIF Ward 6		1,880			1,880
Comrie Community Centre	Life Learn Management		250			250
Comrie Men's Shed	WWF Grant		2,000			2,000
Comrie Millennium Footpath Association	Path Administration Grant		150			150
Comrie Rural Hall	Administration Grant		250			250
Coupar Angus Thursday Friends	WWF Grant		407			407
Coupar Angus Youth Activities Group	GFG		750			750
	WWF Grant		1,607			1,607
CPK Libraries	WWF Grant		9,127			9,127
Craigie and Moncreiffe Parish Church	CIF Ward 10		4,000			4,000
Craigie and Moncreiffe Church Groups	Perth City LAP		350			350
Crieff at Christmas	CIF Ward 6		6,000			6,000
Crieff Baptist Church	WWF Grant		300			300
Crieff Community Trust	Path Administration Grant		150			150
Crieff Connexions	CECF		1,964			1,964
	CIF Ward 6		6,000			6,000
	GFG		2,350			2,350
	WWF Grant		2,475			2,475
Crieff in Leaf	GLF Strathearn/ Strathallan LAP		3,110			3,110
Crook of Devon Village Hall	CIF Ward 8		406			406
CrossReach	SLA 2023/24				56,493	56,493
Crossroads	SLA 2023/24				506,406	506,406
Cruse Bereavement Support	SLA 2023/24				17,746	17,746
Culture Perth & Kinross	GFG		4,000			4,000
Cycle Crieff CIC	GLF Strathearn/ Strathallan LAP		5,000			5,000
Dalguise & District Public Hall	Administration Grant		250			250
Draft and Flow CIC	GLF Highland LAP		6,248			6,248
Duchess Anne Hall	Life Learn Management		250			250
Dunbarney and Forgandenny Parish Church	GLF Almond & Earn LAP		13,000			13,000
	WWF Grant		7,294			7,294
Dunkeld and Birnam First Responders	CIF Ward 5		5,532			5,532

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Dunkeld and Birnam Men's Shed	Strathtay LAP		107			107
Dunkeld Birnam and District Community	Path Administration Grant		150			150
Dunkeld Birnam and District Community Development Trust	CIF Ward 5		3,640			3,640
Dunkeld Community Archive	WWF Grant		3,725			3,725
Dunkeld Creative Community	CAT Enablement Fund		1,410			1,410
Dunning Church Hall	Administration Grant		250			250
Dunning Community Council	CIF Ward 7		1,000			1,000
Dunning Scout Group	CIF Ward 7		6,587			6,587
	Strathearn/ Strathallan LAP		2,043			2,043
Earn Community Council	CIF Ward 9		2,000			2,000
	GLF Almond & Earn LAP		6,538			6,538
Earnsong	Strathearn/ Strathallan LAP		492			492
Elder Voice	WWF Grant		2,400			2,400
Elim Pentecostal Church	WWF Grant		883			883
Elim Pentecostal Church - Grub Hub	Perth City LAP		500			500
Errol Community Council	CIF Ward 1		2,512			2,512
Errol Parish Church	WWF Grant		2,100			2,100
Errol Toddlers Group	WWF Grant		1,520			1,520
Esol Perth	CIF Ward 12		12,580			12,580
	Perth City LAP		325			325
Findo Gask Hall	Administration Grant		250			250
Forgandenny Village Hall	CIF Ward 9		1,000			1,000
	WWF Grant		600			600
Forteviot Village Hall	Administration Grant		250			250
Fowlis Wester Village Hall	Life Learn Management		250			250
Freewheelers Glenfarg	GLF Kinross-shire LAP		1,570			1,570
Friends of Abernethy Kirkyard	CIF Ward 9		500			500
Friends of Wallace Park	CECF		9,149			9,149
Georgetown Community Hall	Administration Grant		250			250
Georgetown Hall Committee	CIF Ward 4		3,307			3,307
Giraffe	GFG		4,000			4,000
	GLF Perth City LAP		3,438			3,438
Girlguiding Blairgowrie and Rattray District	CIF Ward 3		5,000			5,000
Glenfarg Baby and Toddler Group	WWF Grant		300			300
Glenfarg Community Centre	GLF Kinross-shire LAP		2,930			2,930
	WWF Grant		2,640			2,640
Glenfarg Community Transport Group	CIF Ward 8		3,000			3,000
	GLF Kinross-shire LAP		3,000			3,000
GO (GREAT OUTDOORS)	CIF Ward 3		5,870			5,870
Green Shoots Community & Learning	CIF Ward 9		1,000			1,000
	GLF Almond & Earn LAP		4,361			4,361
Greener Glenfarg	GLF Kinross-shire LAP		250			250
Guildtown Community Association	Administration Grant		250			250
Guildtown Friendship Club	WWF Grant		807			807

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Guildtown Hall and Playing Fields	CIF Ward 2		2,723			2,723
Handam	GLF Highland LAP		6,000			6,000
Headway Perth & Kinross	Section 10 2023/24				1,035	1,035
Healthiest Town Aberfeldy	GFG		3,996			3,996
Highland Perthshire Plus	CIF Ward 4		5,000			5,000
	GFG		3,800			3,800
Highland Perthshire Yoga and Wellbeing	CIF Ward 4		2,000			2,000
Hillcrest Futures	WWF Grant		650			650
Home Start Perth	SLA 2023/24			10,000		10,000
Inchture Parent Council	CIF Ward 1		500			500
Inchture Village Hall	Administration Grant		250			250
Inchture Village Hall Trust Fund	CIF Ward 1		1,350			1,350
Independent Advocacy Perth & Kinross	Grant				49,319	49,319
	SLA 2023/24				306,832	306,832
International Cafe	Perth City LAP		480			480
Invergowrie and Kingoodie Light Nights	CIF Ward 1		2,430			2,430
Kettins Community Hub	Administration Grant		250			250
	CIF Ward 2		3,400			3,400
	WWF Grant		500			500
Killiecrankie Memorial Hall Trust	Administration Grant		250			250
King George V Playing Field	CIF Ward 8		1,744			1,744
Kinnoull FC	Perth City LAP		1,000			1,000
Kinross After School Club	GFG		2,713			2,713
Kinross Bowling Club	CIF Ward 8		4,750			4,750
Kinross Centre	CIF Ward 8		2,130			2,130
	SLA 2023/24				114,543	114,543
	WWF Grant		2,840			2,840
Kinross Men's Shed	GLF Kinross-shire LAP		5,000			5,000
	WWF Grant		1,500			1,500
Kinrossie Public Hall	Life Learn Management		250			250
Kinross-shire Climate Café	CIF Ward 8		2,200			2,200
	GLF Kinross-shire LAP		1,495			1,495
Kinross-Shire Volunteer Group Rural Outreach Scheme	CIF Ward 8		1,000			1,000
	SLA 2023/24				7,067	7,067
Kinross-shire Youth Enterprise SCIO	CIF Ward 8		2,000			2,000
	CIF Ward 9		3,000			3,000
Kirkmichael Community Garden	GLF Eastern Perthshire LAP		7,500			7,500
Kirkmichael Session House	GFG		1,620			1,620
	WWF Grant		1,290			1,290
Kirkmichael Village Hall	Life Learn Management		250			250
Kynachan Village Hall	Administration Grant		250			250
Kythe	WWF Grant		3,200			3,200
Letham Climate Challenge	CIF Ward 11		1,100			1,100
	GLF Perth City LAP		2,324			2,324
Letham4All	CAT Enablement Fund		15,485			15,485
	CIF Ward 10		7,560			7,560

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
	CIF Ward 11		3,802			3,802
	GFG		960			960
	GLF Perth City LAP		6,627			6,627
	Perth City LAP		1,700			1,700
	WWF Grant		17,743			17,743
Little Robins Cookery Club	GFG		1,000			1,000
Live Active - Best Foot Forward	GFG		600			600
Logiealmond and Glenalmond Community	CIF Ward 5		765			765
Logos Youth Project	CIF Ward 6		2,000			2,000
	CIF Ward 7		1,300			1,300
	WWF Grant		1,000			1,000
Madderty Community Association	WWF Grant		360			360
Madderty Paths Group	Path Administration Grant		150			150
Madoch Centre	GLF Eastern Perthshire LAP		8,000			8,000
Mantalk	CIF Ward 3		2,000			2,000
	WWF Grant		2,765			2,765
McLean Hall	Administration Grant		250			250
McLean Hall - Fearnan	WWF Grant		750			750
Meigle and Ardler CDT	CIF Ward 2		6,000			6,000
Meigle Minis Playgroup	WWF Grant		566			566
Meikleour Village Hall	CIF Ward 5		3,480			3,480
	Administration Grant		250			250
Methven Arms Hotel	WWF Grant		6,410			6,410
Methven Community Centre	CIF Ward 9		2,000			2,000
	Life Learn Management		250			250
Mid Atholl Village Hall	Life Learn Management		250			250
Millbridge Hall	WWF Grant		500			500
Milnathort and Orwell Community Council	GLF Kinross-shire LAP		1,456			1,456
	Path Administration Grant		150			150
Milnathort Core Paths Group	CIF Ward 8		2,086			2,086
Milnathort Film House	WWF Grant		2,200			2,200
Mindspace Ltd	CIF Ward 12		8,887			8,887
	SLA 2023/24				209,246	209,246
Molteno Memorial Hall	Life Learn Management		250			250
Moncreiffe Parent Council	CIF Ward 10		11,877			11,877
Moncrieffe Community Centre	CAT Enablement Fund		2,485			2,485
Moncrieffe Primary School	Perth City LAP		3,508			3,508
Moubray Hall	Administration Grant		250			250
Moulin Village Hall	Administration Grant		250			250
Mount Blair Community Development Trust	CIF Ward 3		1,500			1,500
Muirton Community Allotment Group	Perth City LAP		850			850
Murthly Village Hall	Administration Grant		250			250
Muthill and Tullibardine Community Council	WWF Grant		1,370			1,370
Muthill Bowling Club	CIF Ward 7		6,000			6,000
National Schizophrenia Fellowship (Scotland)	SLA 2023/24				46,853	46,853

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Nature Connects Perthshire CIC	CIF Ward 6		2,000			2,000
Nest Creative Spaces CIC	CIF Ward 3		2,950			2,950
	WWF Grant		1,230			1,230
New Age Kurling	WWF Grant		1,357			1,357
North Muirton Community Group	Perth City LAP		400			400
	WWF Grant		3,400			3,400
Oakbank Community Centre	Administration Grant		250			250
Open Circle at Perth Baptist Church	CIF Ward 10		5,000			5,000
Orwell and Portmoak Church	WWF Grant		2,000			2,000
Oudenarde Community Group	Almond & Earn LAP		2,163			2,163
	CIF Ward 9		3,000			3,000
	WWF Grant		2,500			2,500
Pamis	SLA 2023/24				10,337	10,337
Parent To Parent Tayside	SLA 2023/24			15,211		15,211
Perth & Kinross Food Bank	GFG		5,000			5,000
Perth Academy Breakfast Club	Perth City LAP		500			500
Perth Access Cars	SLA 2023/24				11,140	11,140
Perth and Kinross Countryside Trust	CECF		10,000			10,000
Perth Autism Support	CIF Ward 8		4,047			4,047
	Educational Support			368		368
Perth Cathedral	WWF Grant		1,540			1,540
Perth College Development Trust	WWF Grant		3,228			3,228
Perth College UHI	GFG		85			85
Perth Hope Hub	WWF Grant		2,138			2,138
Perth Men's Shed	Perth City LAP		500			500
Perth Minorities Association	CIF Ward 12		3,500			3,500
	GLF Perth City LAP		3,437			3,437
	WWF Grant		3,200			3,200
Perth Parrots Floorball Club	CIF Ward 10		1,084			1,084
Perth Sea Cadets	CIF Ward 12		3,000			3,000
Perth Six Circle Project	SLA 2023/24				21,778	21,778
Perthshire Organic Gardeners	GLF Strathtay LAP		3,482			3,482
Perthshire Welfare Society	GFG		1,560			1,560
Perthshire Wildlife	Tayside Ponds Project		6,776			6,776
Perthshire Women's Aid	Housing Support Payments		44,646			44,646
	SLA 2023/24			52,569		52,569
Perthshire Woodcrafters	CIF Ward 1		1,500			1,500
Pitcairngreen Village Hall	Administration Grant		250			250
Pitlochry Baptist Church	WWF Grant		1,650			1,650
Pitlochry Bowling Club	WWF Grant		1,650			1,650
Pitlochry Garden Share	GFG		720			720
	GLF Highland LAP		5,415			5,415
Pitlochry Path Group	Path Administration Grant		150			150
PKAVS	GFG		2,200			2,200
	SLA 2023/24				518,488	518,488
PLUS Perth	CIF Ward 3		2,146			2,146

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
	GLF Perth City LAP		3,437			3,437
	SLA 2023/24				59,323	59,323
Portmoak Community Council	Path Administration Grant		150			150
Portmoak Village Hall	Administration Grant		250			250
	CIF Ward 8		700			700
Pride in Meikle 2015	Path Administration Grant		150			150
Push (Perth & Kinross) Ltd	SLA 2023/24				35,443	35,443
Rannoch Community Trust	CIF Ward 4		5,000			5,000
	WWF Grant		3,000			3,000
Rannoch Paths and Open Space Group	Path Administration Grant		150			150
Ratray Community Garden	GLF Eastern Perthshire LAP		2,576			2,576
Ratray Community Hall	Administration Grant		250			250
Remake Scotland	GLF Strathearn/Strathallan LAP		7,606			7,606
Rewilding Denmarkfield	GLF Strathtay LAP		9,988			9,988
Richmond Community	CIF Ward 6		6,036			6,036
Robert Douglas Memorial Institute	CIF Ward 2		9,940			9,940
	Life Learn Management		250			250
	WWF Grant		2,927			2,927
Rotary Club of Auchterarder & District	CIF Ward 7		9,400			9,400
Royal Voluntary Service	SLA 2023/24				78,093	78,093
Sandison Hall	Administration Grant		250			250
Scone & St Martin's Parish Church	Life Learn Management		250			250
Scone Airport Men's Shed	CIF Ward 2		5,000			5,000
Scone Thistle Junior FC	CIF Ward 2		6,000			6,000
Scottish Canoe Association Ltd	CECF		10,000			10,000
Scottish Fire & Rescue Service	WWF Grant		1,000			1,000
Scottish Huntington's Association	SLA 2023/24				31,863	31,863
SCYD	WWF Grant		3,800			3,800
SENsations Group	Eastern Perthshire LAP		875			875
SHIP	SLA 2023/24			23,603		23,603
Simon Community Scotland	Housing Support Payments		302,869			302,869
Social Flock	Perth City LAP		10,625			10,625
	WWF Grant		23,864			23,864
South Perth Community Garden	Perth City LAP		350			350
South Perth Green Spaces Group	Path Administration Grant		150			150
Spittalfield Village Hall	Administration Grant		250			250
St Columba's Episcopal Church	CIF Ward 5					2,989
	WWF Grant		2,989			3,000
St Fillans Community Trust	Path Administration Grant		150			150
St Johns The Baptist Scottish Church	GFG		800			800
St Madoes and Kinfauns Parish Church	CIF Ward 1		5,700			5,700
	GFG		1,555			1,555

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
St Madoes Community Centre	Administration Grant		250			250
St Martins Public Hall	Administration Grant		250			250
	CIF Ward 2		1,800			1,800
St Matthew's Church	WWF Grant		2,000			2,000
St Stephen's RC Church	WWF Grant		1,810			1,810
Stanley & District Public Hall	Administration Grant		250			250
Stanley Development Trust	GFG		2,722			2,722
	Path Administration Grant		150			150
	WWF Grant		6,968			6,968
Stormontfield Community Association	WWF Grant		860			860
Stormontfield Community Hall	Administration Grant		250			250
Strathearn Arts	CIF Ward 6		3,000			3,000
	WWF Grant		3,200			3,200
Strathmore Community Hub	CIF Ward 2		3,440			3,440
	WWF Grant		2,537			2,537
Sword Forestry Limited	River Almond hogweed spray		1,780			1,780
Tabernacle Hall	Administration Grant		250			250
	WWF Grant		1,100			1,100
Take A Pride in Perth and Kinross Association	CECF		23,418			23,418
Tay and Earn Trust	CIF Ward 1		9,746			9,746
Tayside Council On Alcohol	GFG		400			400
	SLA 2023/24				100,862	100,862
Tayside Upcycling and Craft Centre	CIF Ward 1		5,220			5,220
	GLF Eastern Perthshire LAP		5,000			5,000
The Birks Cinema	GLF Highland LAP		2,000			2,000
	WWF Grant		1,900			1,900
The Birks of Aberfeldy Community Group	Path Administration Grant		150			150
The Breathe Project	CIF Ward 4		5,000			5,000
	WWF Grant		1,900			1,900
The Chapter House Museum Trust	CIF Ward 5		6,300			6,300
The Echo Lab Music Studios	Echo Lab Lessons			4,608		4,608
The Guide Dogs For The Blind Association	Guide dog services			8,809		8,809
The Madoch Centre	WWF Grant		4,450			4,450
The Mindful Partnership	CIF Ward 4		2,700			2,700
The Salvation Army THQ	Housing Support Payments		434,125			434,125
The Sprout Community Group	CAT Enablement Fund		700			700
Thera-Pony C.I.C	CIF Ward 1		1,600			1,600
TRACKS – The Rural Access Committee for Kinross-shire	CECF		7,375			7,375
Trinity Church of the Nazarene	GFG		375			375
Tulach Golf Club - Blair Atholl	WWF Grant		5,000			5,000
Tulloch Net	Perth City LAP		1,500			1,500
	WWF Grant		2,900			2,900
Turning Point Scotland Services Ltd	Housing Support Payments		605,738			605,738

PROVIDER/GROUP	DESCRIPTION	CDS	COM	ECS	HSCP	Total
Upper Tay Anti-Poverty Support Group	CIF Ward 4		5,000			5,000
	WWF Grant		1,900			1,900
Upper Tay Paths Group	CECF		10,000			10,000
	Path Administration Grant		150			150
Vision PK	See Hear 2023/24				8,982	8,982
	SLA 2023/24				210,274	210,274
West Carse Public Hall	CIF Ward 1		4,000			4,000
	Life Learn Management		250			250
West Stormont Woodland Group	GLF Strathtay LAP		4,950			4,950
Williamson Hall	Administration Grant		250			250
Wisecraft	CIF Ward 3		2,740			2,740
	GLF Eastern Perthshire LAP		5,435			5,435
Wolfhill Memorial Village Hall	Administration Grant		250			250
Woman's Walk & Talk	WWF Grant		750			750
Y Centre Ltd	CIF Ward 5		1,514			1,514
	CIF Ward 9		3,750			3,750
YMCA Tayside	GLF Perth City LAP		8,287			8,287
	WWF Grant		3,850			3,850
Grand Total			3,939,434	301,850	2,485,984	6,727,268

PERTH & KINROSS COUNCIL

Finance & Resources Committee

12 June 2024

AUTHORITY TO WRITE OFF DEBTS AND OBSOLETE STOCK

**Report by Strategic Lead - Finance & Business Support
(Report No. 24/182)**

1. PURPOSE

- 1.1 This report seeks approval to write off identified debts in respect of Sales Ledger; Council Tax (including Water & Waste Water charges); Non-Domestic Rates; Irrecoverable Rents; Housing Benefit Overpayments and Car Park Trading Account Income. In addition, approval is sought to write off obsolete stock and write off other miscellaneous balances.
- 1.2 Authority is also sought to update the scheme of charges.

2. RECOMMENDATIONS

- 2.1 The Committee is requested to:
- i. approve that all amounts detailed in **section 4** and included in appendices **1 to 5** are written off for accounting purposes.
 - ii. note that whilst these amounts are written off, the files are not closed, and every effort will be made to collect outstanding debt where recovery is cost effective.
 - iii. approve the removal of charges for services for people seeking asylum for a further year – see **section 5**.
 - iv. approves the revised charges set out in **section 6** and **appendix 6**.

3. BACKGROUND

- 3.1 In order that the appropriate entries may be made in the Council's Annual Accounts for the year ending 31 March 2024, it is necessary to consider the write off of debts, obsolete stock and other miscellaneous balances.
- 3.2 To accommodate year end accounting processes and timescales, some of the Council's systems have already been amended to reflect the proposed adjustments, pending approval by the Committee of the recommendations within this report.
- 3.3 The debts included within this report have progressed through the Council's debt recovery process using the various legislative procedures available for

each category of debt to collect the amounts outstanding. The amounts that remain due, after exhaustive recovery procedures have been undertaken, are included within this report for write off as a last resort. Should any additional information be received, the debt will be written back. Every effort is made to collect outstanding debt where it is cost effective to recover.

- 3.4 This report includes all the recommended write off and on amounts for financial year 2023/24.
- 3.5 The Council continues to support engagement with customers throughout the debt recovery process, particularly because of current increases in the cost of living. For individuals and families, this includes sign posting customers to the Council Tax and Housing Benefits; Welfare Rights and Tenancy Support teams to ensure that they have access to appropriate advice and support in claiming entitlements and maximising household income.

4. PROPOSALS

Sales Ledger

- 4.1 **Appendix 1** details sales ledger debt which it has not been possible to collect for various reasons. Sales ledger debt relates to outstanding income from fees and charges levied for Council services including commercial waste and residential & non-residential care. Many of these debts have been placed with Sheriff Officers, including instances where debtors are deceased or untraceable.
- 4.2 The Council has introduced several measures to maximise income collection including “set-off” (which, in certain circumstances, allows the Council to apply customer debt against payments due by the Council) and encouraging customers to pay at point of sale, therefore, reducing cost of collection and the level of debt. **Appendix 1** also includes the debt recovery process for sales ledger debt.
- 4.3 After consultation with Services who raised the original invoices, it is recommended that the Council write off **£187,414.42** as shown in **Appendix 1**. This amount includes debt relating to seventeen financial years from 2007/08 through to 2023/24. A comparison by Service between the current and the previous financial year is shown below.

Write off By Service	Total 2023/24	Total 2022/23
Corporate & Democratic Services	0.00	3,000.00
Education & Children's Services	6,462.19	20,446.12
Health & Social Care	51,309.77	80,046.04
Communities	129,642.46	165,394.89
	187,414.42	268,887.05

- 4.4 The total provision for bad and doubtful debts included within the Council's unaudited 2023/24 Annual Accounts for sales ledger debt at 31 March 2023 was **£1,191,696**. The total value of sales ledger invoices raised in financial year 2023/24 totalled approximately **£24.2 million** and the proposed write off for all years represents approximately **0.8%** of this amount.
- 4.5 In most instances, accounts raised prior to 30 September 2022 carry a 50% provision whilst those raised prior to 31 March 2022 are fully provided for. Where debts falls into this category, part or all of the amount to be written off will be met from the provision.
- 4.6 Where no provision or only partial provision has previously been made, the balance of the write off will be charged against the issuing Service's Revenue Budget for 2023/24.

Council Tax and Non-Domestic Rates

- 4.7 **Appendices 2 and 3** includes the debt recovery processes for council tax and non-domestic rates respectively. To maximise levels of collection and reduce collection costs, the Council continues to promote the use of electronic forms and payment by direct debit. Approximately **77%** of council tax customers currently pay by direct debit.
- 4.8 **Appendix 2** details council tax (including water and waste water charges) where the sum of **£397,013.53** has been deemed uncollectable (£917,290.81 in 2022/23). There is an overall provision for bad and doubtful council tax debt of **£15,743,023** as at 31 March 2023.
- 4.9 The total amount of Council Tax billed for financial year 2023/24 was **£128 million** (including Water and Waste Water Charges), with an in-year collection rate of **97.53%** (*97.95% in 2022/23*). This is a high collection rate which is expected to be amongst the best in Scotland in 2023/24.
- 4.10 The proposed write offs relate to the last 31 financial years during which time the Council has raised over **£2 billion** in Council Tax and has continually delivered high collection levels.
- 4.11 **Appendix 3** details non-domestic rates income totalling **£681,003.31** which it has not proved possible to collect for the reasons shown in the appendix (£56,014.88 was written off in 2022/23).
- 4.12 In terms of write offs relating to non-domestic rates the costs are met by the Scottish Government through the "pool" mechanism. The provision for bad and doubtful Non-Domestic Rates debt was **£1,035,504** at 31 March 2023.
- 4.13 The amount recommended to be written off for all years represents approximately 1.3% of the **£60.3 million** of non-domestic rates income raised in financial year 2023/24. The in-year collection rate for non-domestic rates was **96.46%** for 2023/24 (*97.91% in 2022/23*).

- 4.15 These proposed write offs relate to the last 24 financial years during which time the Council has billed over **£1.1 billion** in non-domestic rates and has continually delivered high collection levels.
- 4.16 **Appendices 2 and 3** also include accounts where the balance is for a small value either in debit or credit (£0.99) for council tax and non-domestic rates. It is uneconomical to collect or refund/transfer such small amounts and, therefore, an automated process is in place to adjust these accounts.

Housing Revenue Account (Rents)

- 4.17 **Appendix 4** details rent charges raised in respect of former tenants and court expenses incurred which it has not been possible to collect for the reasons set out.
- 4.18 A comprehensive review of former tenant arrears has been undertaken within Communities which has identified a requirement to write off housing rent of **£312,750.05** and **£54,410.95** for sequestrations (£599,701.65 was written off in 2022/23). The provision for bad and doubtful Housing Revenue Account debt was **£1,842,020** as at 31 March 2023. The in-year collection rate for Housing Rents was **98.87%** for 2023/24 (98.61% in 2022/23).
- 4.19 Authority is also requested to write off outstanding arrears on garage sites and lock ups of **£1,002.33** and **£1,243.95** for sequestrations (£1,758.29 was written off in 2022/23).
- 4.20 The overall proposed write off for the Housing Revenue Account is **£369,407.28** (including sequestrations). The total rent charge raised in 2023/24 was £30,388,781.40, with the proposed write off for all years representing 1.2% of this figure.

Housing General Fund

- 4.21 **Appendix 5** details charges for those housing services administered through the Council's rent system, provided to homeless clients placed in temporary accommodation. These tenancies have ended, and it has not proved possible to recover outstanding income, in part, due to the vulnerable nature of the client group.
- 4.22 Authority is requested to write off **£165,166.22** for the period 1 March 2023 to 29 February 2024 (£123,654.38 was written off in 2022/23) for rent and service charges for housing services provided to homeless households placed in temporary accommodation. The provision for bad and doubtful debts in relation to this activity was **£413,165** as at 31 March 2023.
- 4.23 Authority is also requested to write off Housing Benefit overpayment debt of **£41,602** for 2023/24 (£36,763 was written off in 2022/23) which it has not proven possible to recover. The provision for bad and doubtful Housing Benefit overpayment debt was **£1,112,856** as at 31 March 2023. The total value of Housing Benefit overpayments in 2023/24 was approximately

£332,000 and the proposed write off value for all years represents **12.53%** of this amount. The recovery of Housing Benefit payments, however, remains an ongoing process and **£391,000** was recovered in 2023/24 which includes former debt.

Car Park Trading Account Income

- 4.24 Authority is requested to write off **£344,664** in respect of Car Park Trading Account Income (£220,341 was written off in 2022/23). This amount equates to all amounts charged and still outstanding in relation to the period prior to October 2022. The provision for bad and doubtful Car Park Trading Account debt was £379,495 as at 31 March 2023. The proposed write off is equivalent to 18.82% of the number of Penalty Charge Notices issued during 2022/23 (12.92% in the previous financial year).

Stock Write Offs

- 4.25 Authority is requested to write off obsolete stock of **£2,000** in respect of vehicle parts at Friarton Depot (£2,000 was written off in 2022/23). Full provision has been made for this write off.

Outstanding Balances

- 4.26 Authority is requested to write off outstanding balances over various accounts. These balances relate to transactions before 31 March 2023. The net amount of the outstanding balances is a write off to the general fund totalling **£7,664.49** (£7,211.48 was written off in 2022/23). There is a net amount to write on to the HRA totalling **£3,944** (nil in 2022/23).

5. SUPPORT FOR PEOPLE SEEKING ASYLUM

- 5.1 The Council remains committed to providing a safe and welcoming place for people who are seeking asylum and refugees. To support this, it has previously been agreed that charges for all adult care and support services for people seeking asylum with no recourse to public funds and all refugees within Perth and Kinross should be waived. It was also agreed that this position would be reviewed annually.
- 5.2 The demographic of people coming to Perth and Kinross has and continues to be predominantly younger adults, some with children, and it is anticipated that this will continue, resulting in minimal additional demand for adult care and support services. The costs of this proposal are, therefore, nominal.
- 5.3 It is proposed that this position is maintained for 2024/25 and reviewed for 2025/26.

6. UPDATED FEES & CHARGES

- 6.1 On 28 February 2024, the Council approved the 2024/25 Revenue Budget (Report No. 24/63 refers) which included the fees & charges for the current

financial year. Following approval of the budget there were several adjustments to the officer proposals relating to school meals, breakfast clubs and childcare strategy services. For transparency, the updated charges which took effect from 1 April 2024 are set out in **Appendix 6**.

6.2 Since the 2024/25 fees and charges were agreed, further information has been received relating to charges for bereavement services, in particular, Obitus Media Services and Products. The Obitus system is new and was only commissioned in February 2024 and the commercial product “sell price was not available in time to allow for inclusion in the proposed Scheme of Charges approved by Council on 28 February 2024. The rise in the ‘sell price’/media product charged to the Council makes it necessary to increase the charges for these media product services. The proposed increases are in line with updated benchmarking data and will ensure that the Council achieves sufficient income to cover the Obitus annual contract costs and meet full cost recovery for provision of this service. The updated charges are included in **Appendix 6**.

7. CONCLUSION

7.1 In all the above cases it has either not been possible to recover outstanding monies due to the Council or to utilise stocks held by the Council. The write off debt is only recommended after all means of recovery have been exhausted. Although the amounts will be written off for accounting purposes, the files are not closed, and every effort will be made to collect the outstanding debt where new information becomes available and where recovery is cost effective.

Approved

Name	Designation	Contact Details
Andrew Craig	Finance	chxfinance@pkc.gov.uk

Approved

Name	Designation	Date
Scott Walker	Strategic Lead Finance & Business Support	17 May 2024
Claire Mailer	Strategy, People & Resources Director	17 May 2024

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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	None
Strategic Plan	Yes
Resource Implications	
Financial	Yes
Workforce	None
Asset Management (land, property, IST)	None
Assessments	
Equality Impact Assessment	Yes
Strategic Environmental Assessment	Yes
Sustainability (community, economic, environmental)	Yes
Legal	None
Risk	None
Consultation	
Internal	Yes
External	None
Communication	
Communications Plan	None

1. Strategic Implications

Strategic Plan

1.1 The Council's Corporate Plan 2022 – 2027 lays out seven outcome focussed strategic objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:

- Tackling poverty
- Tackling climate change and supporting sustainable places
- Growing a sustainable and inclusive local economy
- Enabling our children and young people to achieve their full potential
- Protecting and caring for our most vulnerable people
- Supporting and promoting physical and mental wellbeing
- Placing communities at the heart of how we work

1.2 This report relates to all of these objectives.

2. Resource Implications

Financial

2.1 There are no direct financial implications arising from this report other than those reported within the body of the main report.

3. Assessments

Equality Impact Assessment

- 3.1. Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.
- 3.2. The information contained within this report has been considered under the Corporate Equalities Impact Assessment process (EqIA) and has been assessed as **not relevant** for the purposes of EqIA.

Strategic Environmental Assessment

- 3.3. The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.4. The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

Sustainability

- 3.5. Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act, the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions.
- 3.6. The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

4. Consultation

Internal

- 4.1. The Chief Executive, Directors and Strategic Leads have been consulted in the preparation of this report.

2. BACKGROUND PAPERS

No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

3. APPENDICES

Appendix 1 – Sales Ledger debt written off in financial year 2023/24 by year and reason

Appendix 2 – Council Tax debt written off in financial year 2023/24 by year and reason

Appendix 3 – Non Domestic Rates debt written off in financial year 2023/24 by year and reason

Appendix 4 – Irrecoverable Rents written off in financial year 2023/24 by year and reason.

Appendix 5 – Homeless debt written off in financial year 2023/24 by year and reason

Appendix 6 – Updated charges

Appendix 1

Sales Ledger Debt Written off in financial year 2023/24 by year and reason

YEAR	GONE AWAY	NO FUNDS	UNECONOMICAL TO COLLECT	DECEASED (NO FUNDS)	HCC DISCRETION PANEL	SEQ/LIQ OR REC	DEBT PRESCRIBED	COMMERCIAL RENT	SERVICE REQUEST	TOTAL VAT EX	VAT VALUE	TOTAL DEBT
2007/08							1,331.24			1,331.24		1,331.24
2008/09							2,858.44			2,858.44		2,858.44
2009/10							2,223.44			2,223.44		2,223.44
2010/11							105.76			105.76		105.76
2011/12							9,671.82			9,671.82		9,671.82
2014/15									5,111.45	5,111.45		5,111.45
2015/16							348.66			348.66		348.66
2016/17							762.79	10,664.20		11,426.99		11,426.99
2017/18						460.00	18,875.99			19,335.99	1,319.94	20,655.93
												0.00
2018/19	129.68	6,013.79	45.96	41.41	740.54	378.35	7,535.88			14,885.61	1,702.55	16,588.16
2019/20	2,427.42	8,504.26	366.11	1,121.61	861.78	139.89				13,421.07	1,388.86	14,809.93
2020/21	164.00	5,455.55	457.87	241.62	1,722.50					8,041.54	345.03	8,386.57
2021/22	2,522.61	29,492.69	1,307.02	1,635.53	1,323.59	678.07				36,959.51	3,470.82	40,430.33
2022/23	6,052.58	28,852.75	824.53	3,411.65	1,127.33	1063.46				41,332.30	1,076.28	42,408.58
2023/24	2,576.53	5,671.48	372.17	799.29	539.76	137.80				10,097.03	960.09	11,057.12
TOTAL	13,872.82	83,990.52	3,373.66	7,251.11	6,315.50	2,857.57	43,714.02	10,664.20	5,111.45	177,150.85	10,263.57	187,414.42

The Council can claim back VAT due to the VAT Bad debt relief (The Council cannot claim for the first 6 months, however the Council can claim back 4 years prior to this to 30 September 2019). £4,411.35 VAT is outwith the terms to be claimed back between 2017-2020

Sales Ledger Debt Recovery Process (excluding Commerical Rent)

Day 1 - Invoice Issued

If not paid, Day 29 - Final Notice issued

If not paid, Day 44 - 7 Day letter issued

Thereafter, each case is looked at individually and most cases are then passed to either the Sherriff Officer or Legal Services to collect.

Commercial Rent Debt Recovery Process

Day 1 - Invoice Issued (min 4 weeks prior to due date)

Day 29 - reminder sent to first time defaults

Day 29 - legal letter issued to persistent late payers

Day 38 - If no payment made, surveyor contacts tenant to discuss.

Day 44 - Thereafter, each case is looked at individually and most cases are then passed to either the Sherriff Officer or Legal Services to collect.

Day 44 - Interest will be added, where appropriate to late rent.

Appendix 2

Council Tax Written-Off During Financial Year 2023/24 - Summary of Write-Off Reasons

Financial Year	Statutory Additions	Deceased - No Estate	No Trace	Sequestration etc.	Small Balances	Uneconomical/ Unable to Pursue/Collect	Council Tax Reduction Official Error	Total
1993	£17.27	£0.00	£29.33	£0.00	£0.01	£223.60	£0.00	£270.21
1994	£0.00	£0.00	-£138.66	£0.00	-£0.02	£0.00	£0.00	-£138.68
1995	£58.58	£21.44	£287.57	£0.00	£2.07	£125.19	£0.00	£494.85
1996	£46.70	£268.45	£0.00	£0.00	-£1.22	£103.58	£0.00	£417.51
1997	£58.54	£155.63	-£48.16	£0.00	-£0.61	£70.57	£0.00	£235.97
1998	£63.84	£98.91	£260.65	£0.00	£0.59	£620.69	£0.00	£1,044.68
1999	£123.42	-£31.81	£355.07	£0.00	£0.00	£807.70	£0.00	£1,254.38
2000	£104.83	-£35.23	£77.88	£529.79	-£4.59	£0.00	£0.00	£672.68
2001	£216.08	-£121.07	-£741.32	£909.27	-£7.23	£14.35	£0.00	£270.08
2002	£60.89	-£41.29	-£1,173.28	£1,007.00	-£0.05	£138.61	£0.00	-£8.12
2003	£450.04	-£168.98	-£318.73	£1,707.21	-£4.37	£0.00	£0.00	£1,665.17
2004	£304.78	£242.97	£43.60	£1,239.64	-£1.28	£17.43	£0.00	£1,847.14
2005	£202.00	-£3,141.79	-£1,271.06	£2,045.86	-£2.50	£0.00	£0.00	-£2,167.49
2006	£385.50	£890.55	-£384.40	£2,494.39	£1.76	£0.00	£0.00	£3,387.80
2007	£690.30	£1,648.05	£341.18	£2,516.23	£0.65	£0.00	£0.00	£5,196.41
2008	£724.24	-£1,077.03	£1,027.37	£5,065.11	£0.56	£0.00	£0.00	£5,740.25
2009	£867.63	£1,739.87	-£912.34	£3,784.81	-£2.09	£0.00	£0.00	£5,477.88
2010	£1,042.16	£115.13	£1,138.55	£4,229.03	-£1.56	£0.00	£0.00	£6,523.31
2011	£1,429.91	-£7,485.65	-£754.48	£4,498.79	-£5.80	£0.00	£0.00	-£2,317.23
2012	£1,341.70	£2,094.98	£1,023.22	£6,664.19	-£5.32	£9.69	£0.00	£11,128.46
2013	£1,789.17	£2,187.52	-£5,715.45	£5,971.03	-£3.45	£19.63	£178.33	£4,426.78
2014	£1,497.19	£3,522.02	£1,430.28	£7,426.31	-£0.71	£17.07	£0.00	£13,892.16
2015	£2,386.07	-£1,906.00	£4,206.76	£9,749.38	-£2.47	£3.02	£0.00	£14,436.76
2016	£2,354.57	£507.07	£2,437.70	£14,058.60	-£5.77	-£12.85	£0.00	£19,339.32
2017	£2,537.72	£736.25	£1,740.24	£14,384.92	-£2.81	£1,345.90	£14.96	£20,757.18
2018	£2,920.88	-£3,366.86	£3,801.67	£17,059.63	£6.09	£200.00	£35.46	£20,656.87
2019	£5,098.38	£3,458.02	£20,256.26	£23,625.45	£6.20	£8.81	£32.42	£52,485.54
2020	£7,246.93	£9,736.78	£23,823.21	£32,888.65	£8.49	£23.20	£25.60	£73,752.86
2021	£7,895.31	-£2,292.14	£15,522.64	£37,791.52	£0.35	£8.48	£26.59	£58,952.75
2022	£4,935.10	£1,453.85	£9,532.26	£27,140.83	-£84.24	£418.39	£180.49	£43,576.68
2023	£3,625.76	£1,888.94	£7,500.29	£20,410.79	£125.40	£240.19	£200.80	£33,741.37
Totals	£50,475.49	£11,098.58	£83,377.85	£247,198.43	-£234.72	£4,403.25	£694.65	£397,013.53

Council Tax Debt Recovery Process

Day 1 - Bill Issued with instalment details

If not paid, Reminder issued giving 14 days to pay

If not paid, Summary Warrant applied for - 10% penalty applied, charge becomes payable in full

If not paid, Sheriff Officer instructed to collect debt

If not paid, Sheriff Officer serve a "Charge for payment" to allow diligence

Appendix 3

Non-Domestic Rates Written-Off During Financial Year 2023/24 - Summary of Write-Off Reasons
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Financial Year	Statutory Additions	Deceased	No Trace	Sequestration, Liquidation etc.	Ceased Trading	Wrongly Rated	Small Balances	Uneconomical to Pursue/Collect	Total
1995 - 1999	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
2000	£55.95	£0.00	£0.00	£0.00	£559.47	£0.00	£0.00	£0.00	£615.42
2001	£315.06	£0.00	£0.00	£0.00	£3,150.61	£0.00	-£0.01	£0.00	£3,465.66
2002	£377.75	£0.00	£0.00	£0.00	£3,777.46	£0.00	£0.70	£0.00	£4,155.91
2003	£371.03	£0.00	£0.00	£0.00	£3,710.34	£0.00	£0.08	£0.00	£4,081.45
2004	£561.62	£0.00	£1,247.91	£0.00	£3,024.99	£0.00	£0.00	£0.00	£4,834.52
2005	£606.56	£0.00	£0.00	£0.00	£3,032.80	£0.00	£0.00	£0.00	£3,639.36
2006	£510.80	£545.44	£1,200.00	£0.00	£2,953.86	£0.00	£0.00	£0.00	£5,210.10
2007	£501.69	£1,594.56	£0.00	£0.00	£2,901.23	£0.00	£0.00	£0.00	£4,997.48
2008	£548.46	£0.00	£0.00	£0.00	£3,171.65	£0.00	£0.00	£0.00	£3,720.11
2009	£333.10	£0.00	£0.00	£0.00	£3,330.92	£0.00	£0.00	£0.00	£3,664.02
2010	£547.42	£0.00	£0.00	£0.00	£2,737.07	£0.00	£0.00	£24.72	£3,309.21
2011	£286.49	£0.00	£0.00	£0.00	£2,864.85	£0.00	£0.00	£0.00	£3,151.34
2012	£302.63	£0.00	£0.00	-£80.01	£3,026.25	£0.00	£0.00	£0.00	£3,248.87
2013	£559.25	£0.00	£0.00	£0.00	£5,592.51	£0.00	£0.00	£0.00	£6,151.76
2014	£570.15	£0.00	£0.00	£0.00	£5,701.45	£0.00	£0.00	£0.00	£6,271.60
2015	£980.40	£0.00	£3,993.60	£0.00	£5,810.40	£0.00	£0.50	£2.00	£10,786.90
2016	£988.57	£0.00	£4,518.57	£1,452.77	£5,858.82	£1,687.95	£0.00	£0.00	£14,506.68
2017	£701.42	£0.00	£13,642.97	£0.00	£4,739.22	£1,863.04	£0.00	£0.00	£20,946.65
2018	£1,174.92	£0.00	£1,701.41	£0.00	£9,114.01	£6,256.06	£0.00	£0.00	£18,246.40
2019	£3,182.20	£0.00	£2,271.40	£13,564.54	£14,688.55	£15,382.67	-£1.96	£0.00	£49,087.40
2020	£6,955.73	£0.00	£2,424.58	£52,044.42	£10,058.60	£30,239.77	£3.14	£0.00	£101,726.24
2021	£8,855.56	£0.00	£717.01	£80,030.68	£4,949.00	£74,001.92	£6.77	£0.00	£168,560.94
2022	£10,991.12	£95.92	£124,151.37	£88,528.87	-£1,655.41	£0.00	£2.06	£0.00	£222,113.93
2023	£2,389.36	£195.93	-£41,405.04	£39,639.81	£13,693.03	£0.00	-£12.57	£10.84	£14,511.36
Totals	£42,667.24	£2,431.85	£114,463.78	£275,181.08	£116,791.68	£129,431.41	-£1.29	£37.56	£681,003.31

Non-Domestic Rates Debt Recovery Process

Formal recovery cannot take place until 30 September each year

If not paid, Ratepayer must be 2 instalments in arrears, final notice is issued

If not paid, Summary Warrant applied for - 10% penalty applied, charge becomes payable in full

If not paid, Sheriff Officer instructed to collect debt

If not paid, Sheriff Officer serve a "Charge for payment" to allow diligence

Appendix 4

Irrecoverable Housing Rents Debt Written off in financial year 2023/24 by year and reason
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YEAR	GONE AWAY	NO FUNDS	UNECONOMICAL TO COLLECT	DECEASED (NO FUNDS)	DEBT PRESCRIBED	TOTAL DEBT
2017/18					3762.63	£3,762.63
2018/19					£708.45	£708.45
2019/20	£2,722.24		£207.25			£2,929.49
2020/21	£11,441.11		£153.34	£269.89		£11,864.34
2021/22	£544.89		£294.59			£839.48
2022/23	£9,983.62	£22,335.59	£1,372.80	£2,762.96		£36,454.97
2023/24	£152,012.87	£83,730.79	£7,492.89	£12,954.14		£256,190.69
TOTAL	£176,704.73	£106,066.38	£9,520.87	£15,986.99	£4,471.08	£312,750.05

Irrecoverable Rents Debt Recovery Process

Day 14 - Arrears reminder letter sent

If not paid, Day 21 - Attempt Contact with tenant

If not paid, Day 28 - Further investigation either 7 day non-occupation letter or Pre Notice of Proceedings letter sent

If not paid, Day 35 - Notice of Proceedings served by Sheriff Officer

If not paid, Day 42 - Visit to tenant

If not paid, Day 49 - Warning Letter Generated with effective date of Notice of Proceedings and possible court action

If not paid, Day 56 - Taken to Eviction Prevention Panel and authorisation for Court Action sought

Appendix 5

Homeless Debt Written Off in financial year 2023/24 by year and reason

YEAR	GONE AWAY	NO FUNDS	UNECONOMICAL TO COLLECT	DECEASED	SEQ/LIQ OR REC	DEBT PRESCRIBED	TOTAL DEBT
2017/18						£71,655.01	£71,655.01
2018/19						£19,571.60	£19,571.60
2019/20	£5,283.85	£400.67	£117.18				£5,801.70
2020/21	£3,281.57	£2,323.31					£5,604.88
2021/22	£2,967.19	£2,811.73	£8,760.75	£1,001.70			£15,541.37
2022/23	£4,654.73	£10,305.25	£12,415.10	£613.21			£27,988.29
2023/24	£3,845.23	£2,425.22	£12,732.92				£19,003.37
TOTAL	£20,032.57	£18,266.18	£34,025.95	£1,614.91	£0.00	£91,226.61	£165,166.22

Homeless Debt Recovery Process

Day 14 - Arrears reminder letter sent

If not paid, Day 21 - Attempt Contact with tenant

If not paid, Day 28 - Further investigation either 7 day non-occupation letter or Pre Notice of Proceedings letter sent

If not paid, Day 35 - Notice of Proceedings served by Sheriff Officer

If not paid, Day 42 - Visit to tenant

If not paid, Day 49 - Warning Letter Generated with effective date of Notice of Proceedings and possible court action

If not paid, Day 56 - Taken to Eviction Prevention Panel and authorisation for Court Action sought

UPDATE TO FEES AND CHARGES FOLLOWING BUDGET DECISIONS ON 28TH FEB 2024.

	Actual Charge 23/24	VAT	Actual Total Charge 23/24 (Inc VAT)	Actual Charge 24/25	VAT	Actual Total Charge 24/25 (Inc VAT)
20: SCHOOL MEALS & BREAKFAST CLUBS						
Primary Pupils	£2.15	£0.00	£2.15	£2.25	£0.00	£2.25
Secondary Pupils	£2.30	£0.00	£2.30	£2.60	£0.00	£2.60
Adult Meals	£3.08	£0.62	£3.70	£4.17	£0.83	£5.00
Breakfast Clubs	£2.00	£0.00	£2.00	£2.00	£0.00	£2.00
<i>The above prices are effective from 15 April 2024.</i>						
21: CHILDCARE STRATEGY SERVICES						
KIDS CLUBS:						
Term Time:						
One Child	£9.70	£0.00	£9.70	£10.20	£0.00	£10.20
Additional Child	£9.20	£0.00	£9.20	£9.70	£0.00	£9.70
Holidays and In-Service Days:						
Up to 5 Hours	£19.00	£0.00	£19.00	£19.95	£0.00	£19.95
Up to 7 Hours	£21.25	£0.00	£21.25	£22.30	£0.00	£22.30
7 Hours+	£23.50	£0.00	£23.50	£24.70	£0.00	£24.70
<i>The above prices are effective from 1 July 2024.</i>						
EARLY LEARNING AND CHILDCARE						
Per Hour	£5.25	£0.00	£5.25	£5.25	£0.00	£5.25
Meal *	£2.42	£0.00	£2.42	£2.42	£0.00	£2.42
Per 6 Hour Session Including Meal and Snack	£33.92	£0.00	£33.92	£33.92	£0.00	£33.92
<i>N.B. There will be no change to the Registration Fee for Kids Clubs at £13 for a single child and £20 per Family.</i>						
<i>* Scottish Milk and Healthy snack grant funds 58p per day per Nursery pupil for snack and milk.</i>						

6: BEREAVEMENT SERVICES - CREMATION CHARGES (Extract)	24/25 Charges listed below approved by Perth & Kinross Council 28/2/24				Requested - Increased 24/25 Charges below - Finance & Resources Committee - 12 June 2024			
	Charge 24/25	VAT Status	VAT	Total Charge 24/25 (Inc VAT)	Charge 24/25	VAT Status	VAT	Total Charge 24/25 (Inc VAT)
OBITUS MEDIA SERVICES AND PRODUCTS								
Tributes								
Single Photo - Free of Charge	£0.00	S	£0.00	£0.00	£0.00	S	£0.00	£0.00
Basic Slideshow - Photo slideshow of up to 25 photos	£41.67	S	£8.33	£50.00	£45.83	S	£9.17	£55.00
Music Tribute - Tribute of up to 25 photos timed to chosen music	£62.50	S	£12.50	£75.00	£66.67	S	£13.33	£80.00
Themed Tribute - Up to 25 photos professionally edited and timed from a range of curated themes and music	£79.17	S	£15.83	£95.00	£82.50	S	£16.50	£99.00
Bespoke Tribute - Professionally crafted bespoke tribute	£333.33	S	£66.67	£400.00	NOT CURRENTLY AVAILABLE - IN DEVELOPMENT			
Tributes Extra's								
Extra Single Photo - Surcharge for any additional holding images beyond the single photo	£10.83	S	£2.17	£13.00	£11.67	S	£2.33	£14.00
Tribute Download	£8.33	S	£1.67	£10.00	£11.67	S	£2.33	£14.00
Extra Tribute Photo's - For each extra 25 photo's on a visual tribute	£17.50	S	£3.50	£21.00	£20.83	S	£4.17	£25.00
Extra Work Charge - Fee applied to any standard products for additional work (eg adding video to a tribute)	£17.50	S	£3.50	£21.00	£19.17	S	£3.83	£23.00
Family Supplied Tribute - Family supplied video/photo tribute used as received with basic quality checks	£20.83	S	£4.17	£25.00	£25.83	S	£5.17	£31.00
Streaming								
Live & On Demand - Professionally live streamed service link with option to view online for 28 days:-								
Live Stream	£27.50	E	£0.00	£27.50	£38.00	E	£0.00	£38.00
On Demand - online for 28 days	£13.33	S	£2.67	£16.00	£18.33	S	£3.67	£22.00
See Note 2								
Keepsakes								
DVD or USB - DVD or USB copy of service, tribute or both in personalised grey linen case	£51.67	S	£10.33	£62.00	£51.67	S	£10.33	£62.00
Video Book - Portable video of service, tribute or both set in A5 electronic screen encased in linen-wrapped 'book'	£79.17	S	£15.83	£95.00	£82.50	S	£16.50	£99.00
Memory Box - Up to 25 photos professionally printed & delivered in linen-wrapped box	£108.33	S	£21.67	£130.00	£115.83	S	£23.17	£139.00
Keepsakes Extra's								
Blu-Ray or Audio CD - Blu-Ray or audio CD copy of live stream/tribute or both wrapped in personalised linen box	£45.83	S	£9.17	£55.00	AVAILABLE ON REQUEST			
Second Copies - Any additional copies of DVD or USB keepsakes	£23.33	S	£4.67	£28.00	£25.00	S	£5.00	£30.00
Bundles								
Obitus Bundle (Full):- Single photo + Music Tribute + Livestream + 1 Keepsake item =£132.50 - Bundle only discount								
breakdown as below:-								
* Bundle (discounted) Charge - Single Photo + Music Tribute + 1 Keepsake item	£111.00	S	£22.20	£133.20	NOT CURRENTLY AVAILABLE - IN DEVELOPMENT			
* Bundle (discounted) Charge - Livestream	£21.50	E	£0.00	£21.50	NOT CURRENTLY AVAILABLE - IN DEVELOPMENT			
* Discounted charges are only applicable when purchased as part of the full bundle - see Note 2								
Services for Young People (Under 18)								
Live & On Demand + Single Photo + Basic Slideshow up to 25 photos - Free of Charge	£0.00	E/S	£0.00	£0.00	£0.00	E/S	£0.00	£0.00
NOTES								
1 Obitus media services and product offers may be subject to change.								
2 HMRC policy change (March 2024) - Livestream to be exempt from VAT - Grouped / Bundled / Discounted charges are listed individually to reflect the 'multiple supply' breakdown for VAT invoicing purposes only, these charges are only applicable when the full bundle offer is purchased.								

PERTH AND KINROSS COUNCIL

Finance & Resources Committee – 12 June 2024

Housing & Social Wellbeing Committee – 19 June 2024

MISSING SHARES PILOT – FEEDBACK AND RECOMMENDATIONS

Report by Strategic Lead – Housing & Communities
(Report No. 24/183)

1. PURPOSE

- 1.1 At the meeting of the then Housing and Communities Committee on, 31 May 2021 and the then Strategic, Policy & Resource Committee on, 2 June 2021 ([Missing Shares 2021](#)) it was agreed that a Missing Shares Service be piloted for a period of two years.
- 1.2 This report details the benefits identified as a result of the pilot and recommends that the Missing Shares Service be extended for a further 3 years.

2. RECOMMENDATIONS

It is recommended that Finances and Resources Committee:

- (i) agrees the funding of any Missing Shares Service, for a further 3 years, via the second homes budget, as a recoverable income.

It is recommended that Housing & Social Wellbeing Committee:

- (ii) notes the success of the pilot.
(iii) approves the extension of the Missing Shares Service for a further 3 years on a recoverable income basis, and

3. STRUCTURE OF REPORT

3.1 This report is structured over the following sections:

- Section 4: Background/Main Issues
- Section 5: Proposals
- Section 6: Conclusion
- Appendices

4. BACKGROUND / MAIN ISSUES

- 4.1 The original committee report approved on 31 May 2021 [Missing Shares 2021](#) (Report No. 21/70 refers) sought agreement to pilot a Missing Shares Service to assist the significant number of properties across Perth & Kinross, in shared ownership, and suffering a variety of communal disrepair issues. Knowledge at that time indicated that failure to progress communal repairs by

some private property owners was primarily due to an inability of all parties to pay, or due to the lack of co-operation between all responsible parties.

- 4.2 Extensive disrepair issues can result in structural deterioration. This can range from water penetration, wet/dry rot and crumbling stonework. This deterioration not only adversely affects the day to day lives of local homeowners and tenants but often poses a wider safety risk in terms of, for example, falling masonry, slipped slates, unsafe platforms or stairways. Extreme disrepair has even resulted in partial building collapse, evacuation and rehousing of residents and in one case recently, defaulted demolition works.
- 4.3 Communal disrepair problems can also create a significant adverse resource impact on a variety of Council services, including Environmental Health, Building Standards, Development Control, Housing and Economic Development. Building Standards colleagues report that 50% of the dangerous and defective building complaints relate to tenement buildings with numbers rising due to an ageing building stock. It is also considered that building deterioration is likely to accelerate due to the increase in extreme weather events. Therefore, early intervention is key to preventing buildings progressively declining, and can also minimise future costly repairs.
- 4.4 As enforcement action is extremely resource intensive and costly, the pilot has enabled funding for the minority of homeowners either unwilling and/or unable to progress the necessary communal repairs, with minimal impact on Council services.
- 4.5 The missing shares process is ultimately the responsibility of the property owners with the Missing Shares Service simply approving the process and providing an agreed minority missing share. The Housing (Scotland) Acts 2006/14 provide local authorities with the powers to pay a missing share, and to recover the costs from an owner via a repayment charge attached to the title of the property, recouped at the point of sale. However, as opposed to waiting until a property is sold, a monthly repayment plan, over a 5-year period (or shorter), can be agreed and therefore deemed a recoverable income in financial terms. The Council also applies an administration charge of 15%, which can act as a catalyst for works to be progressed without a missing share being required. Several missing shares already processed have either been recovered in full, or a payment plan set up for a period of up to five years.
- 4.6 Funding for the two-year pilot was underwritten by the Affordable Housing Earmarked reserve budget and as a precaution capped at £200,000. £40,000 was also allocated to employ a Missing Shares Officer, subsequently recruited in September 2021.
- 4.7 Since the introduction of the pilot, the following outcomes have been achieved:
 - Of the **180 enquiries** received regarding issues with communal repairs, 70% have been resolved, and repairs have progressed without any

financial intervention from the Council. This has been achieved from the Missing Shares Officer tracing and contacting owners, assessing titles and facilitating and mediating meetings with property owners.

- **£800,000 worth of communal repairs** have been undertaken without the need to apply the missing shares process. This significant investment in local building maintenance has only cost the salary of the Missing Shares Officer and has also reduced the need for intervention by other Council services.
- Out of the above enquires, only **14 missing share applications** (6 complete, 8 pending) have been required. This is primarily due to the missing share option being a last resort when all other options have been exhausted.
- The **14 applications involve 125 properties** (110 private homes and 15 local businesses) and the missing shares funding, provided by PKC, currently totals **£144,000**. However, the **total value of the works** achieved by private property owners as a result of this financial intervention is well **over £1,070,000**.
- The level of communal repair improvements has come at a **small Council spend of £40k for the Missing Share Officer and £144k in missing shares**. However, the £144k is a recoverable income through the repayment process (standard 5 years, along with a repayment charge on the property title).
- **Feedback from property owners has been positive**, with some being empowered to progress repair works themselves.
- **Several activities have been introduced to improve the awareness of building condition issues** for private property owners, officers, and Elected Members. These include awareness raising via Tenement Repair Events, Missing Shares Drop-in Sessions, Missing Shares Advice Events, Under One Roof events, Building Condition Walks and Information for Landlords Event.
- **The creation of a Building Condition Working Group**. This multi-service group discusses problematic buildings in most need of repair and seeks the best mechanisms to rectify the issues through a joined-up approach.

4.8 The 'Summary Evaluation of the 2.5 Year Missing Shares Pilot' in Appendix 1 provides further details on the financial spend and breakdown of completed and pending cases.

4.9 To assess the benefits of the service, a feedback survey was distributed with excellent feedback on the Missing Share Service returned. These results are outlined in Appendix 2.

5. PROPOSALS

5.1 Based on the demand and current benefits achieved, it would be deemed premature at this stage to conclude this Service. Momentum continues to build as the Service becomes more established and there is undoubtedly a significant number of older buildings, many in Perth City centre, requiring assistance to rectify long term disrepair issues. It is therefore proposed that:

- The existing pilot be extended for a further 3 years.
- The Missing Shares Officer post be extended in line with the proposed pilot extension for a further 3 years.

5.2 A 5-year period (initial 2-year+ pilot plus recommended 3-year extension) would provide better data on which to base future decisions on the viability of the Service in the longer term.

5.3 Confirmation has been attained from Finance & Resources that funding from the second homes budget reserves is available to underwrite any future Missing Shares for a further 3-year period and also extend the existing Missing Shares Officer post for the same period.

6. CONCLUSION

6.1 The Missing Shares Service is an innovative way that tackles properties across Perth & Kinross, in shared ownership, that have a variety of communal disrepair issues. The Service, through its proactive and collaborative approach, reduces resource impacts on other Council services. It benefits local homeowners, and businesses, by removing the barriers to resolve disrepair issues by empowering property owners through support and advice and, as a last resort, through missing shares funding.

6.2 With a significant number of deteriorating buildings, likely to worsen with climate change impacts, officers recognise the inequalities often suffered by those living in poorer environments affecting their mental and physical wellbeing and currently compounded by the cost-of-living crisis. The Missing Shares Service seeks to improve living conditions, create safer buildings, retain investible housing stock, and provides a more attractive, sustainable place to live/work and visit.

6.3 By extending the service for another 3 years an informed review can be carried out to determine the future long-term benefits, potential financial impacts and seek a permanent funding structure going forward, including ways to make the service operate on a full cost recovery model.

Authors

Name	Designation	Contact Details
Kirsty Steven	Principal Officer, Environmental Health	(01738) 475000 ComCommitteereports@pkc.gov.uk
Kayleigh Mustard	Missing Shares Officer	

Approved

Name	Designation	Date
Elaine Ritchie	Strategic Lead, Housing & Communities	3 June 2024

APPENDICES

Appendix 1 – Missing Share Service Pilot Summary

Appendix 2 – Service & Officer Performance (Internal & External)

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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	Yes
Corporate Plan	Yes
Resource Implications	
Financial	Yes
Workforce	Yes
Asset Management (land, property, IST)	No
Assessments	
Equality Impact Assessment	No
Strategic Environmental Assessment	No
Sustainability (community, economic, environmental)	No
Legal and Governance	Yes
Risk	Yes
Consultation	
Internal	Yes
External	Yes
Communication	
Communications Plan	Yes

1. Strategic Implications

Community Plan/Single Outcome Agreement

1.1 This report supports all the priorities within the Community Plan 2022-32.

- (i) *Reducing Poverty (including child poverty, fuel poverty and food poverty)*
- (ii) *Mental and physical wellbeing*
- (iii) *Digital participation*
- (iv) *Skills, learning and development.*
- (v) *Employability*

Corporate Plan

1.2 This report supports the objectives within the Corporate Plan:

- (i) *Children and young people grow up safe, respected, well-educated, and confident in their ability to realise their full potential.*
- (ii) *People and businesses are increasingly able to prosper in a local economy which support low carbon ambitions and offers opportunities for all.*
- (iii) *People can achieve their best physical and mental health and have access to quality care and support when they need it.*
- (iv) *Communities are resilient and physically, digital and socially connected.*
- (v) *Perth and Kinross is a safe and vibrant place, mitigating the impact of climate and environmental change for this and future generations.*

2. Resource Implications

Financial

- 2.1 It was previously agreed as part of the pilot that missing shares costs from each owner would be sought through a repayment plan between 5 and 30 years, with a repayment charge applied to the title of each property to provide additional security. However, a £200k fund to under write any budget pressures was also allocated, along with £40,000 per to fund a Missing Shares Technician to implement the scheme. The Councils Affordable Housing earmarked reserve was designated for both these aspects of the pilot.

An extension to the pilot will be funded by the Second Homes Revenue Budget.

Workforce

- 2.2 There is no capacity to integrate the work associated with Missing Shares Service within existing teams therefore it is recommended that the temporary employment of the Missing Shares Officer, currently employed until September 2024, be extended to provide the missing shares service for any pilot extension.

Asset Management (land, property, IT)

- 2.3 Not applicable

3. Assessments

Equality Impact Assessment

- 3.1 The proposals have been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:

- Assessed as **not relevant** for the purposes of EqIA.

Strategic Environmental Assessment

- 3.2 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.

Sustainability

- 3.3 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. Under the Climate Change (Scotland) Act 2009 the Council also has a duty relating to climate change and, in exercising its functions must act:

- in the way best calculated to delivery of the Act's emissions reduction targets.
- in the way best calculated to deliver any statutory adaptation programmes; and
- in a way that it considers most sustainable.

3.4 No steps are required to be considered relating directly to this report.

Legal and Governance

3.5 The Strategic Lead - Legal and Governance has been consulted in the preparation of this report and there are no adverse comments raised.

Risk

3.6 Any risks associated will be mitigated by the monitoring and reporting procedures which are in place for the work concerned.

4. Consultation

Internal

4.1 As part of the collaborative working approach with other PKC services internal feedback has been sought and very favourable responses have been received, see Appendix 2. There has also been positive feedback from several elected members who have been actively involved in the service.

External

4.2 Feedback has been sought from a variety of service users who provided very complimentary comments on the successfulness of the service and the valuable support and advice provided by the Missing Shares Officer.

5. Communication

5.1 Further media promotion of the service to all stakeholders will be relaunched should the committee recommendations to extend the Missing Shares Service and Officer be agreed for a further 3 years. Key target audiences will include those private property owners with existing communal disrepair issues, owners of empty homes and registered landlords.

2. BACKGROUND PAPERS

2.1 Housing and Communities Committee, 31 May 2021 and the Strategic, Policy & Resource Committee, 2 June 2021 – Report No. 21/70 ([Missing Shares 2021](#)).



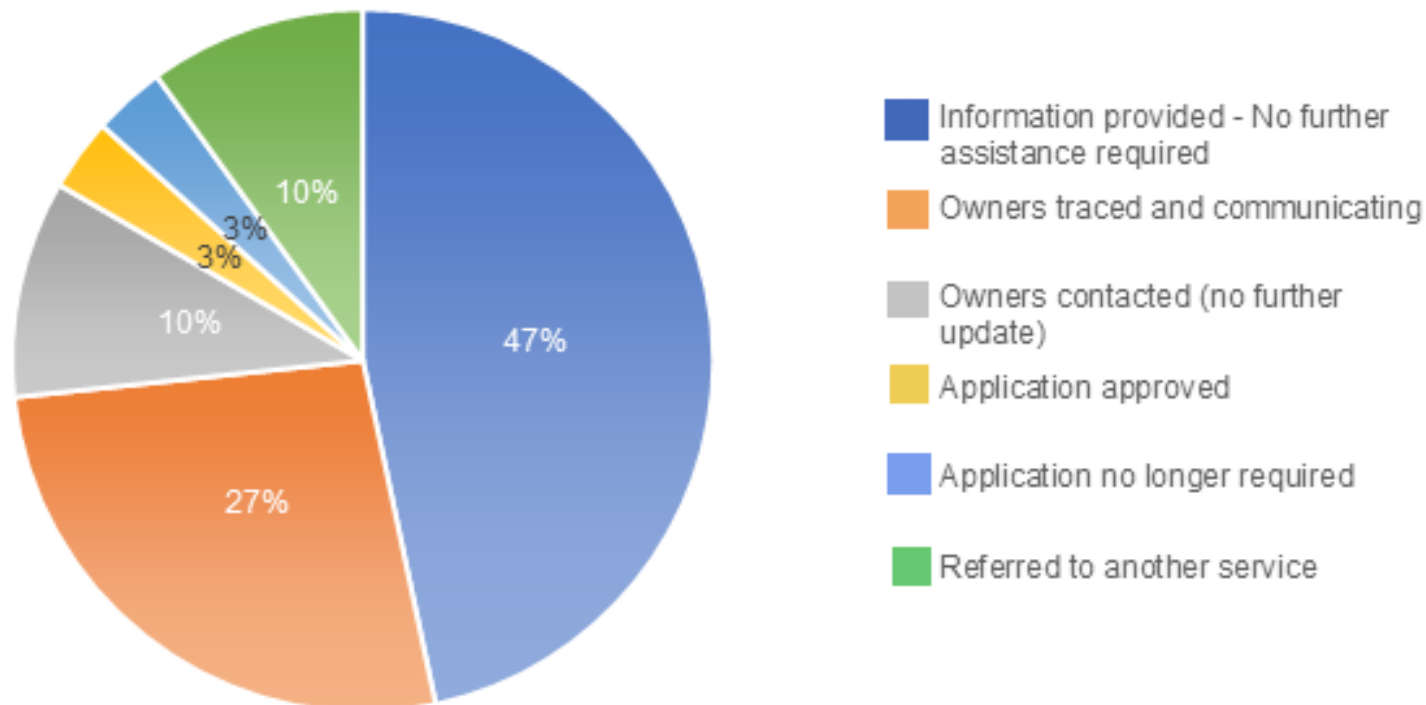
APPENDIX 1

MISSING SHARE SERVICE PILOT- FEEDBACK

Cases

No. Enquiries	Closed/ Resolved	Ongoing	Missing Share applications and amount	Outcomes	Value of Works facilitated. (with and without applications)
180	122	58	14 applications Total £144k.	1 No Longer Required 13 Approved	£1.07m+

Reason for Enquiry Closed/Resolved



Applications Completed

Properties	Missing Share Paid	Repayment Charge Applied to Property Title	Repayment Plan agreed over next 5 years.	Total Value of Works
Perth	£4,000	Yes	Pending	£15,000
Crieff (2 shares)	£1,000	Not required (paid)	Not required (paid)	£8,000
	£1,000	Yes	Yes	
Perth	£8,000	Yes	Pending	£77,000
Muthill	£6,000	Yes	Yes	£14,000
Perth (Paid after approval)	£0	Not required	Not required	£6,000
Perth	£14,000	Yes	Pending	£140,000
TOTAL	£34,000	/	/	£260,000

Applications Pending

Properties (Perth)	Missing Share Amount	Total Value of Works
Project 1	£8,000	£50,000
Project 2	£ 10,000	£55,000
Project 3	£15,000	£145,000
Project 4	£3,000	£30,000
Project 5	£45,000	£150,000
Project 6	£10,000	£40,000
Project 7	£15,000	£305,000
Project 8	£4,000	£35,000
TOTAL	£110,000 (+ £34,000 completed)	£810,000 (+ £260,000 completed)
Total of complete and pending applications	£144,000	£1,070,000
Support and Advice Only	£0	£800,000
Total Works Facilitated		£1,870,000


Long Term Case Details – (previously no solution – now progressing/concluded)

Premises	First Issues Reported	Communal repair (health & safety) issues	Barriers overcome by Missing Shares Service (MSS)	Coordination of Key Service Providers
1. Perth project (Works Completed)	20/08/2012	<ul style="list-style-type: none"> • Fallen and loose roof tiles, if left unattended may cause water ingress. • Render falling from chimney stack, Scottish Fire and Rescue Service were called to attend and remove loose sections at risk of falling and causing harm. 	<ul style="list-style-type: none"> • Minority owner refusing to cooperate with repair process. • Court action halted repairs. • MSS application underway to assist with financial shortfall from unwilling owner. • Contractor chosen by homeowners. 	Planning – Conservation, Building Standards, Environmental Health
2. Perth project (Phase 1 Works Completed)	29/09/2016	<ul style="list-style-type: none"> • Prominent building of local historic relevance has become an eyesore with many aspects of the disrepair posing a risk to the residents and wider public. • Water leaking from broken guttering deteriorating the fabric of the building. • Crumbling render and stonework with vegetation growing in the mortar from long term neglect. 	<ul style="list-style-type: none"> • Building Condition Survey identified over £2M of works. • Not all owners communicating. • One property repossessed through bankruptcy proceedings. • Phased repairs agreed and MSS providing organisational assistance and application process underway. • All owners contacted, all but one paid, reviewing contractors. 	Planning – Conservation, Vacant Properties, Perth and Kinross Heritage Trust
3. Perth Project (providing support and assistance)	01/07/2018	<ul style="list-style-type: none"> • Water pouring down from broken guttering, deteriorating the external fabric, and causing considerable damage to the properties within. • Broken lintel and deteriorated roof timbers causing cascades of water in poor weather and raises concerns for the stability of the building overall. • Water damage to the internal walls of the shared stairwell due to extended periods of water ingress from the roof. 	<ul style="list-style-type: none"> • One landlord owns 50% of the building, other owners are powerless to progress repairs without this landlord's cooperation. • Negotiations with owners remain uneasy, • Dangerous Buildings Notice registered and works in default from November 2022. 	Building Standards, Landlord Registration, PKC Lets, Vacant Properties
4. Perth Project (works progressing)	14/05/2008	<ul style="list-style-type: none"> • Long term issues with vegetation due to blocked guttering, damaged drainage and sewage pipes 	<ul style="list-style-type: none"> • Owners of top floor flats have been attempting to arrange repairs for many years. 	Environmental Health, Vacant Properties

		<ul style="list-style-type: none"> Cracking and water ingress caused by roof disrepair has rendered one property uninhabitable. 	<ul style="list-style-type: none"> Communication with all owners never possible. MSS facilitated all owners in communication for first time ever. Surveyor instructed. 	
5. Perth Project (works underway)	15/09/2021	<ul style="list-style-type: none"> Storey building, chimney stack with loose falling masonry - damaged a car. Loose masonry and chimney pots removed by Scottish Fire and Rescue Service to reduce danger of further falling debris. 	<ul style="list-style-type: none"> Owners struggling to contact all owners. MSS assisted and all but 1 owner communication and cooperating. Contractor chosen and instructed. Coordination of additional works identified with owners. 	Building Standards

Service Development

Website Activity	In two years of the Shared Repairs page going live on the PKC website, it has had 2608 views by 935 unique users, most of these users have viewed the page multiple times. Shared housing repairs - Perth & Kinross Council (pkc.gov.uk)
Advice Document Creation	Missing Shares Service Leaflet - MS Leaflet.pdf Common Repair Assistance - Common Repairs Assistance.pdf Missing Shares application and templates - Application Docs
Missing Shares Service Promotion	Email Campaign Radio Campaign – 8 weeks Heartland FM Social media and Newspaper campaign Missing Shares: Funding to help Perth and Kinross residents with repairs (thecourier.co.uk) (2) Perth & Kinross Council Facebook Building Banners displayed on scaffolding where works assisted
Events	<ul style="list-style-type: none"> Tenement Repair and Maintenance Event April 2022 Missing Shares event May 2023 Training event for PKC Staff May 2023 Public information event hosted by Under One Roof May 2023 Information for Landlords August 2023 Public Building Condition Walks August 2023 Under One Roof – Owners’ Associations (open to all) October 2023
Novoville P&K release	Novoville Shared Repairs is a mobile app that helps owners to organise and implement shared repairs in tenement buildings by providing a communication platform, banking function, advice, and support.

<p>(Virtually factoring app to assist owners with tenement repairs)</p> 	<p>Meetings with Novoville consultant to tailor the app for P&K Consultations with Edinburgh City Council Arranging Pilot Tenements Facilitating IT arrangements for Better Business Partnership and application marketing launch</p>
<p>Annual Housing Statistics Return and Local Housing Strategy</p>	<p>Reviewing and submitting information and contributing to consultations including requests to include a more detailed representation of the condition of privately owned buildings in Perth & Kinross to inform ongoing repair needs in this sector.</p>
<p>Inform Policy and Procedure</p>	<p>Informing policy and procedure for Missing Shares Service and Application process, with regular review and update to account for ongoing service user feedback.</p>

SERVICE FEEDBACK

Satisfaction Rating - Officer	98%
Satisfaction Rating – Missing Shares Service	93%

External Feedback Results (Anonymised)**Is there anything the service could have done to assist you or is there any further feedback you would like to provide?**

This service must be continued. The support was extremely valuable when I felt powerless to resolve my housing issues due to other landlords.

The Officer was very professional, helpful and dealt with everything we asked

The officer was great. The issue lies with the Council having a minimum value on the work they are willing to look at. This means that small jobs are not getting done, these small jobs will become big jobs and so the service does nothing to help, unless you happen to be unfortunate enough to have a block where you need massive repairs already. This needs to be looked at urgently to allow this service to function properly.

Good service and I hope it keep running.

The people that do not make good on their liabilities to make good on property repairs cause those that are good citizens' extra expense. It would be good to see the nuisances being held to account and made responsible for the costs that they incur. Age, state of mind and frailty should be taken into account, but not used as an excuse.

Nope. Just that the Officer was fantastic.

Excellent Service and support. Reassuring to know 'Missing Shares' is there if needed. Really helps in encouraging owners to participate in common repairs

This is an excellent service provided by the council and we were very appreciative that there was information online and indeed with the officer to be able to make sure we were aware of all our options going forward. The Officer was professional, approachable and very prompt in communication. They sent all the information we required, and we feel comfortable in being able to communicate freely with them with any future queries. They are an excellent ambassador for the service.

Just more resource - more people to handle calls and to chase and understand what's happening

I just hope this service continues, it is the only way people like myself can get repairs done, when others involved don't want to pay and without this service people like myself would be homeless.

This is a great service; their assistance was crucial in securing all the funding my block required for maintenance.

No everything that could be done was done. The Officer was very helpful and informative

Everything possible was done.

It was really helpful for a letter to go to co-owners outlining their shared responsibilities once the title deeds had been consulted. This was the main reason we didn't need to use the Missing Shares service in the event.

Internal Feedback Results from Other Perth & Kinross Council Services

Name/Service	Is there anything the service could have done to assist you or is there any further feedback you would like to provide?
Environmental Health	This is a valuable service for internal colleagues, providing up to date information and knowledge we can take forward in our own roles as well as being able to direct queries, that are more relevant, on to the missing shares scheme. Having a dedicated officer for this role has meant that customers get a personalised service and point of contact for what is often a stressful and anxious experience of communal repairs and housing matters that can be very daunting to approach. Having this level of service ultimately makes for an easier, manageable experience and best outcome for all.
Building Standards	Where Building Standards have taken enforcement action against owners, it has been a real benefit to be able to direct owners someone who can provide them with guidance on how to organise themselves, get repairs done, and access funds if required. We are now seeing repairs being completed where previously the work would have fallen to the Council as a statutory duty, and the costs having to be recovered.
Perth & Kinross Heritage Trust	The service is a fantastic resource to support owners who wish to repair their buildings. Additional value has been added by working cooperatively with Perth and Kinross Heritage Trust on projects where there may be grant assistance available through the Perth City Heritage Fund and, conversely, where potential grant assisted projects need Missing Shares support. Case studies can be provided if required.
Vacant Properties	The Missing Shares Service works in partnership with many other departments of the Council (Building Standards, Vacant Property etc), supporting owners to undertake repairs and therefore in many cases avoiding these properties becoming in a greater level of disrepair and requiring a greater level of intervention from the Council. It would be a significant loss to the service provision of PKC if the Missing Shares Service was not continued. Across the region and particularly in our city and town centres, we have a lot of aging tenemental housing stock which requires ongoing communal repairs to be organised by owners. Increasing the quality and availability of city and town centre housing is key to the future vibrancy and economic viability of our city and town centres; the Missing Shares Service plays a key role in delivering this aim

PERTH AND KINROSS COUNCIL

Finance and Resources Committee

12 JUNE 2024

PERTH WEST PROGRESS REPORT

**Report by Strategic Lead – Economy, Development & Planning
(Report No. 24/184)**

1. PURPOSE

- 1.1 This report provides members with an update on the progress made in respect of the funding and income streams that will offset the estimated expenditure to deliver the first phase of the Perth West investment project.
- 1.2 In order to secure effective, serviced employment land with industrial and commercial occupiers at the proposed Perth EcoInnovation Park (PEIP) at Perth West, enabling infrastructure is required. This infrastructure will also facilitate new housing development (including the proposed net zero carbon Lamberkine Village). This report considers the funding and income streams.

2. RECOMMENDATIONS

- 2.1 It is recommended that the Committee:
- Note the anticipated decision path detailed in the report.
 - Agree to proceed with Stage 1 of pre-construction works at an estimated cost of c£1.55m against the capital allocation of £3m in 2024/25.
 - Asks Strategic Leads for Economy, Development & Planning, Strategic Lead and for Legal and Governance and Strategic Lead – Finance & Business Support to report back on progress.

3. STRUCTURE OF REPORT

- 3.1 This report is structured over the following sections:
- Section 4: Background/Main Issues
 - Section 5: Proposals
 - Section 6: Conclusion
 - Appendices

4. BACKGROUND / MAIN ISSUES

- 4.1 It is difficult for private developers to raise finance for significant upfront infrastructure investment because lenders are reluctant to accept risk with no guaranteed return, or the length of time over which borrowing would be repaid. As a result, such infrastructure is normally provided by the public sector with a long-term legal obligation on developers to meet a proportionate

cost through developer contributions. Without public intervention at Perth West, the PEIP will not be provided for many years, weakening Perth's competitiveness given the undersupply of available, serviced industrial and commercial plots.

4.2 The development of Perth West will support the delivery of key Council strategies:

- Corporate Plan: develop a resilient, stronger, and greener economy, tackle climate change and support sustainable places, and tackle poverty.
- PK Climate Change Strategy and Action Plan: a national net zero exemplar for decarbonisation of transport and energy.
- Tay Cities Regional Economic Strategy and the emerging Perth and Kinross Economy Action Plan: create better paid and higher skilled jobs and high value economic outputs in energy and clean technologies, support an enterprising mindset.
- Perth City Plan: make Perth a carbon-neutral city by 2040.
- Perth and Kinross Local Development Plan 2 (LDP2): promote the sustainable economic growth of the area to the year 2029. LDP2 allocated 262.3ha for residential, commercial and community uses at Perth West (Site MU70). The southern part of Perth West allocation is promoted by the landowner, the John Dewar Lamberkine Trust (JDLT). Planning Permission in Principle was granted in November 2023 (application reference 20/00667/IPM). It includes 1,500 homes (Lamberkine Village) up to 26ha of commercial development (PEIP) and other community infrastructure.

4.3 Due to the short supply of available employment land in the Perth area (and across the wider Council area), and the need to diversify Perth's economy, the strategic rationale is to deliver serviced employment land in advance of any residential development providing future contributions to infrastructure costs. This requires investment upfront in enabling infrastructure to access the site and deliver the first phase of the development: Specifically, the enabling infrastructure will:

- Deliver an underpass under the A9 to access the site and establish active travel infrastructure from Perth West into Perth City. This will minimise the impact on traffic generated by the development and support sustainable transport choices.
- Deliver a commercial business park of 11ha of serviced employment land (PEIP Phase 1).
- Support business growth and create high value jobs in the clean growth sector. Approximately 1,000 jobs could be created when the PEIP is fully developed and occupied over both phases.
- Create a national exemplar of net zero carbon development. Phase 1 will incorporate a smart local energy system, where energy can be generated, stored, and used locally.

A second, longer-term phase will provide up to 15ha of employment land and 500 homes, subject to further private sector infrastructure provision.

- 4.4 In March 2023, the Council considered the Outline Business Case for the PEIP and approved capital funding of £10 million towards the cost of delivering enabling works for Phase 1 of the project (Report 23/73 refers).
- 4.5 At its meeting on 31 January 2024, the Finance & Resources Committee approved the re-phasing of £3m of expenditure on Perth West enabling works from the 2023/24 financial year to 2024/25 pending the outcome of ongoing negotiations with the landowner (Report 24/41 refers).
- 4.6 At its budget meeting on 28 February 2024, the Council remitted officers to provide a progress report to the Finance & Resources Committee on 12 June 2024 in relation to securing the remainder of the funding to deliver the first stage of the project (Report 24/64 refers).
- 4.7 The current cost estimate for the infrastructure for Phase 1 of the Perth West development is £32.8 million. Table 1 below shows the estimated costs (derived from cost consultant estimates). Varying ranges of Optimism Bias (OB) have been applied and shown as a percentage. The initial cost estimates included an OB of 30% given that only outline designs have been prepared, but those that generally apply to roads infrastructure (23% structures, 15% roads) have also been included. The final choice of OB will depend on how much risk the Council is willing to accept. The costs make an assumption on inflation, but they do not include land purchase costs.

	Cost (£m) 30% OB	Cost (£m) 23% OB	Cost (£m) 15% OB
Underpass + Innovation Highway Link to PEIP + Platforming + Utilities	32.84	31.35	29.65

- 4.8 The current approved General Fund Capital Budget 2024/25 - 2029/30 includes the following funding assumptions for the Perth West enabling works:

Funding streams	£m
Council Budget allocation (Report 23/73 refers)	10
Tay Cities Deal Funding	5
Future land sales or borrowing funded from PEIP future commercial rental income	5
Developer Contributions	13
Total	33

- 4.9 The current estimate of pre-construction costs for the Perth West project in relation to site investigation and design is approximately £2.208m and can be split into two stages:
- Stage 1: estimated £1.552m for design development for planning and site investigations and for planning and Environment Impact Assessment, Orders, and consents.
 - Stage 2: estimated £0.656m for detailed design, contract preparation for tender, procurement, and site supervision for construction.

The revised timeframe for delivering the enabling works is now likely to be towards the end of 2028 at the earliest. A Procurement Strategy was prepared for design work for the underpass and related works and a contractor selected and will be awarded subject to the Council's capital budget consideration.

5. PROGRESS TO DATE

- 5.1 The Council's funding strategy for the enabling works for Perth West relies on the above identified funding streams to be secured and an update is provided for each below. Key milestones in the project development are also detailed to provide an anticipated decision path for the Committee to consider.

Tay Cities Deal Funding

- 5.2 A Tay Cities Deal grant of £5m has been earmarked for Perth Innovation Highway which is the innovation element of the enabling infrastructure involving the installation of digital infrastructure and Intelligent Transport Systems to manage transport in and around the site and the corridor between the site and Perth city centre. The Outline Business Case will be considered by Tay Cities Management Group in July 2024. A Full Business Case needs to be approved by the Tay Cities Region Joint Committee late 2024. Due to delays in OBC and FBC submission and approvals and in the project development, allocated funding from years 2022/23, 2023/24 and 2024/25 has been placed in Year 10 (2029/30) of the Tay Cities Deal Programme. However, the Council will be able to ask for acceleration to bring funding forward from Year 10 to align with project construction timescale and spend. The following table provides the current Tay Cities Deal allocation profile for the project (£000):

2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	Total
0	550	505	500	500	2,945	5000

Future land sales

- 5.3 Receipts of c£5m from sales of serviced employment land have been identified as a funding stream. There were based on the direct sale of 27 acres (11ha) of employment land @ £190,000/acre. Current evidence of market prices is now closer to £150,000/acre which would deliver a sale receipt of c£4m. However, it is important to note that sales would not be effective before construction has been completed beyond 2028 and would be realised over a period of years possibly to 2035. In that context, it is difficult to estimate market price so far ahead.
- 5.4 An important consideration is also to retain some control of the use of the employment land to align with our ambitions to promote PEIP as a catalyst to attract suitable developers and occupiers. Control of the use could be achieved in different ways:
- Retaining land ownership and act as the site developer either directly or as part of an agreement with a private developer. This would mean that £5m

- capital receipts would not come forward with the need to increase borrowing but would generate a revenue stream to fund borrowing.
- Transferring ownership via sale or long-term ground lease with development agreement. This would mean that capital receipts would come forward in line with market price at the time of sale.

5.5 In any case, one key element to realise our ambitions would be to stimulate demand to attract developers and business occupiers to PEIP. Different marketing and promotion activities have been carried out to attract interests from developers and business occupiers (e.g. Scottish Cities Alliance Cities Week, Tay Cities Clean Growth Cluster, SCDI/UKDBT investment portfolio). There is an indication of strong interest from businesses in the transport, logistics and energy sector to occupy the PEIP and develop innovative uses, for example Stagecoach is interested in developing a state-of-the-art Electric Vehicle facility. However, the Council does not yet have formal commitment from any potential PEIP business occupiers. The challenge for businesses is that they cannot commit without certainty of delivery and what would be offered in terms of servicing. This conundrum is the principal driver of market failure in the provision of employment land in many parts of the country.

Developer Contributions

- 5.6 The contributions are focusing on the development of 1,000 residential units for which a plan has been produced by JDLT, and 11 ha for PEIP. It is also anticipated that a second planning application, by Muir Homes, would be submitted during 2024 and associated developer contributions would also be required, potentially spreading the cost between two private developers rather than solely obligating JDLT. Contributions would still to be based on a build out of 1,000 units in total and if that were to transpire appropriate legal agreements would have to be put in place to secure developers' contributions from Muirs Home. An indicative amount of £13m in total has been identified as a proportionate sum for such contributions towards the delivery of Phase 1.
- 5.7 JDLT has now agreed in principle to the transfer 11 ha of employment land in Phase 1 to the Council at a price still to be negotiated and the related land for the transport infrastructure to be transferred for nil consideration. Formal legal contracts have not yet been put in place.
- 5.8 JDLT has also now agreed in writing to the principle of providing £13m in contributions. The negotiation to secure this sum legally will continue to secure such commitment. It is important to note that even when this commitment is secured, its payment is dependent on the completion of residential units and therefore the Council still carries some risk.
- 5.9 Should the Council be willing to carry risk, it is recommended that the Committee agree to proceed with stage 1 of pre-construction works at an estimated cost of c£1.55m against the capital allocation of £3m in 2024/25. This would allow a review of estimated costs, risks and adjust the OB as well as keeping a reasonable timescale for project completion and help firm-up position during negotiations. Negotiations to secure a full financial solution

would continue alongside pre-construction works. However, if a legal agreement ultimately cannot be secured, the pre-construction works would become abortive costs and create a revenue budget pressure.

- 5.10 If the Council is unable to accept this risk, pre-construction works would be delayed until a legal agreement is finalised, inevitably delaying the completion of the project beyond 2029/30.

Key milestones and proposed decision path

- 5.11 Key milestones have been identified as anticipated decision path if recommendations are agreed:

- Approval of £1.55m to fund design works (June 2024).
- Appointed of Design Consultant (July 2024).
- Start infrastructure planning and concept design works (July/August 2024).
- Signature of Heads of Terms and Agreements securing in principle £13m of developer contributions and transfer of land ownership by December 2024.
- Approval of Tay Cities Deal Full Business Case by March 2025.
- Decision on employment land disposal or retention by March 2025.
- Formal legal agreements implementing Heads of Terms to be put in place/ready to sign off by March 2025
- Approval of full funding strategy by the Council by March 2025.
- Issue of Tender for design and construction (June 2025) (Future tender strategy will determine if contract is procured as Traditional or Design & Build).
- Planning permission granted by March 2026.
- Contractor in place by March 2027.
- Start of construction (April 2027).
- Completion of main construction by December 2028.

- 5.12 It should be noted that there may be an opportunity to accelerate this programme through early identification of opportunities and collaborative working from all parties who are engaged to deliver the contract.

- 5.13 It is recommended that the Committee note the anticipated decision path and agree to proceed with Stage 1 of pre-construction works at an estimated cost of c£1.55m against the capital allocation of £3m in 2024/25.

6. CONCLUSION

- 6.1 The Council has agreed to support the Perth West project and is working with JDLT, the current landowner to secure future industrial and commercial occupiers as well as housing development. The upfront cost of enabling infrastructure is estimated at c£33m and the proportionate cost of the enabling infrastructure to be recovered through future developer contributions is estimated at c£13m. Other financing sources have been identified including Council funding, the Tay Cities Regional Deal and future land sales.

- 6.2 It has not yet been possible to finalise an agreement with the landowner to secure the developer contributions to the project however a written in principle

agreement has been reached. Officers are confident that a finalised agreement can be reached when there is greater certainty over the total project costs which requires pre-construction works to be undertaken. Accordingly, and considering the anticipated economic benefits, it is recommended that the Council be prepared to carry the risk of proceeding before there is a fully funded scheme in place, by commencing pre-construction works at an estimated cost of c£1.55m from the approved capital allocation of £3m.

Author

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Approved

Name	Designation	Date
David Littlejohn	Strategic Lead – Economy, Development & Planning	20 May 2024

APPENDICES

- None

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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	Yes
Corporate Plan	Yes
Resource Implications	
Financial	Yes
Workforce	None
Asset Management (land, property, IST)	None
Assessments	
Equality Impact Assessment	None
Strategic Environmental Assessment	None
Sustainability (community, economic, environmental)	Yes
Legal and Governance	None
Risk	None
Consultation	
Internal	Yes
External	None
Communication	
Communications Plan	None

1. Strategic Implications

Community Plan/Single Outcome Agreement

- 1.1 The objectives of the Perth and Kinross Community Plan/Single Outcome Agreement together reflect proposed action towards environmental, social, and economic well-being, necessary for delivering and achieving sustainable development. The proposal therefore relates to the following 2 priorities:

- (i) *Skills, learning and development*
- (ii) *Employability*

Corporate Plan

- 1.2 The objectives of the Council's Corporate Plan collectively reflect proposed action towards environmental, social, and economic well-being, necessary for delivering and achieving sustainable development. The proposal therefore relates to the following 2 priorities:

- (i) *People and businesses are increasingly able to prosper in a local economy which support low carbon ambitions and offers opportunities for all;*
- (ii) *Perth and Kinross is a safe and vibrant place, mitigating the impact of climate and environmental change for this and future generations.*

2. Resource Implications

Financial

- 2.1 This report recommends proceeding with stage 1 of pre-construction works at an estimated cost of c£1.55m against the capital allocation of £3m in 2024/25. However, if a legal agreement ultimately cannot be secured for developers' contributions and the project cannot proceed, the pre-construction works would become abortive costs and create a budget revenue pressure.

Workforce

- 2.2 This report has no direct workforce implications

Asset Management (land, property, IT)

- 2.3 This report has no direct asset management implications.

3. Assessments

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties. The Equality Impact Assessment undertaken in relation to this report can be viewed clicking [here](#).

This section should reflect that the proposals have been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:

- (i) Assessed as **not relevant** for the purposes of EqIA.

This proposal is presented as an update in an advisory capacity only.

Strategic Environmental Assessment

- 3.2 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.

Option 1 However, no action is required at this stage. An Environment Impact assessment would be carried out as part of the pre-construction works.

Sustainability

- 3.3 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. Under the Climate Change

(Scotland) Act 2009 the Council also has a duty relating to climate change and, in exercising its functions must act:

- in the way best calculated to delivery of the Act's emissions reduction targets;
- in the way best calculated to deliver any statutory adaptation programmes; and
- in a way that it considers most sustainable.

The pre-construction works would provide information on how the project would contribute towards sustainable development.

Legal and Governance

- 3.4 This report would provide funding towards a consultancy contract to carry out pre-construction works and has identified the need to sign Heads of Terms with a view to securing legal agreements to secure £13m of developer contributions and the ownership of the land for phase 1 development and the enabling infrastructure.

Risk

- 3.5 This report has finance, legal and reputational risks.

4. Consultation

Internal

- 4.1 The Strategic Lead, Legal and Governance and the Strategic Lead, Finance and Business Support have been consulted.

5. Communication

- 5.1 Not available (n/a).

2. BACKGROUND PAPERS

- 2.1 None

PERTH & KINROSS COUNCIL

Committee Checklist & IVA Summary

Report name - Perth West Development Progress Report

Description of proposal screened for IVA - In order to secure effective, serviced employment land with industrial and commercial occupiers at the proposed Perth EcoInnovation Park (PEIP) at Perth West, enabling infrastructure is required. This infrastructure will also enable new housing development (including the proposed net zero carbon Lamberkine Village). This report provides members with an update on the progress made and particularly in relation to the funding and income streams to offset the estimated expenditure to deliver the first phase of the Perth West project.

Committee for submission - Finance and Resources Committee

Council Service - Economy, Place & Learning - Education & Learning

Contact details - Serge Merone smerone@pkc.gov.uk

Committee Checklist

The following functions have been assessed for impacts in relation to the committee proposal:

Strategic & Resource Implications	Impact identified?
Community Plan/LOIP Priorities	Yes.
Corporate Plan Priorities	Yes.
Workforce implications	No.
Asset Management implications	Yes.
Legal implications	Yes.
Corporate Risk implications	Yes.
Consultation undertaken or planned	Yes.
Communications undertaken or planned	Yes.
Data Protection implications	No.
Child Rights & Wellbeing Impact Assessment	Impact identified?

GIRFEC Wellbeing Indicator(s) - SHANARRI	No.
Climate Change Impact Assessment	Impact identified?
Business, Industry & Supply Chain impact	Yes.
Energy, Buildings & Infrastructure impact	Yes.
Land Use & Land-Use Change impact	No.
Transport & Connectivity impact	Yes.
Waste & the Circular Economy impact	Yes.
Climate Resilience & Engagement impact	Unsure.
Equality & Fairness Impact Assessment	Impact identified?
Protected Equality Characteristics impact	No.
Human Rights impact	No impact.
Inequalities of outcome (socio-economic disadvantage) impact	Positive impact.
Inequalities of outcome (Communities of Place or Interest) impact	
Sustainable Procurement & Supply Chain Impact Assessment	Impact identified?
Resource Consumption & Waste impact	No.
Promoting Social Wellbeing impact	Yes.
Enhancing Environmental Wellbeing impact	No.
Improving Economic Wellbeing impact	Yes.
Strategic Environmental Assessment (SEA)	Impact identified?
Environmental impact and/or significant environmental effects	This proposal does not qualify for SEA.

Impact & Value Assessment (IVA) - Detailed Summary

Where the Impact & Value Assessment has identified a likely impact in relation to the committee proposal, a detailed evidence response is provided below:

Community Plan Priorities

Reducing Poverty? - Yes

Physical & Mental Well-being? - No

Digital Participation? - No

Learning & Development? - No

Employability? - Yes

Corporate Plan Priorities

Working in partnership with communities? - No

Tackling poverty? - Yes

Tackling climate change and supporting sustainable places? - Yes

Developing as resilient, stronger and greener local economy? - Yes

Enabling our children & young people to achieve their full potential? - No

Protecting and caring for our most vulnerable people? - No

Supporting and promoting physical and mental wellbeing? - No

Finance

Any financial implications identified? - Yes.

Yes, capital funding. This report recommends proceeding with stage 1 of pre-construction works at an estimated cost of c£1.55m against the capital allocation of £3m in 2024/25. However, if a legal agreement ultimately cannot be secured for developers' contributions and the project cannot proceed, the pre-construction works would become abortive costs and create a budget revenue pressure.

Workforce

Any workforce implications identified? - No.

Asset Management Implications

Any asset management implications identified? - Yes.

The proposal will require transfer of ownership for the land for phase 1 development and the enabling infrastructure.

Legal Implications

Any legal implications identified? - Yes.

This report would provide funding towards a consultancy contract to carry out pre-construction works and has identified the need to sign Heads of Terms with a view to securing legal agreements to secure £13m of developer contributions and the ownership of the land for phase 1 development and the enabling infrastructure.

Corporate Risk Implications

Any corporate risk implications identified? - Yes.

This report has finance, legal and reputational risks.

Consultation

Any internal or external consultation undertaken? - Yes.

Internal and external consultation. The Strategic Lead, Legal and Governance and the Strategic Lead, Finance and Business Support have been consulted. Consultation is also taking place with the landowner, the John Dewar Lamberkine Trust (JDLT).

Communications

Any communications produced or planned? - Yes.

Statement will be prepared to inform of progress and then on the Perth West and Perth Eco Innovation park development.

Data Protection

Any data protection implications identified? - No.

If YES, has a Data Protection Impact Assessment (DPIA) been completed? -

(Leave blank if not relevant)

Background Documents

Any background documents used?

(Leave blank if not relevant)

Climate Change Impact Assessment

Business, Industry & Supply Chain impact? - Yes.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards. The proposal will provide additional employment land for business to start and grow with new skills and green job opportunities at Perth Eco Innovation Park and also within the supply chain. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco

Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as power and heat, travel or water use. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as power and heat, travel or water use.

Energy, Buildings & Infrastructure impact? - Yes.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as power and heat reductions. This would be specified when more design has been undertaken. This would be specified when more design has been undertaken. This would be specified when more design has been undertaken.

Land Use & Land-Use Change impact? - No.

Transport & Connectivity impact? - Yes.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as travel and logistics. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as travel or transport of goods The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as active travel or public transport. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as reduction of vehicle trips. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards such as travel from and to Perth City centre supporting modal shift.

Waste & the Circular Economy impact? - Yes.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards and work together to develop circularity in the Park.

Climate Resilience & Engagement impact? - Unsure.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards which would demonstrate climate change in action. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards which would demonstrate climate change in action.

Equality & Fairness Impact Assessment (EFIA)

Protected equality characteristics impact? - No.

Human Rights impact? - No impact.

Inequalities of outcome caused by socio-economic disadvantage impact? - Positive impact. The proposal will provide additional employment land for business to start and grow and support clean growth at Perth Eco Innovation Park. It will provide access to skills and new jobs for people seeking a job or willing to improve their skills or learn new skills. **A full EFIA has been undertaken (based on likely impacts from inequalities of outcome caused by socio-economic disadvantage).**

Inequalities of outcome in relation to Communities of Place or Communities of Interest impact? - **A full EFIA has been undertaken (based on likely impacts from inequalities of outcome in relation to Communities of Place or Communities of Interest).**

Child Rights & Wellbeing Impact Assessment

Impact based on the GIRFEC wellbeing indicators? - No.

Sustainable Procurement & Supply Impact Assessment

Are goods and/or services already listed on the procurement register being procured? - No.

Resource use and consumption impact? - No.

Social wellbeing impact? - Yes.

Procurement of services and construction will support real living wage and community benefits

Environmental wellbeing impact? - No.

Economic wellbeing impact? - Yes.

The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. It will provide opportunities for local business to benefit from the construction phase and the operations phase. The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. It will provide opportunities for local business to benefit from the construction phase and the operations phase.

Strategic Environmental Assessment (SEA)

This proposal does not qualify for SEA.

Environmental impacts identified? - The proposal will provide additional employment land for business to start and grow and support clean growth Perth Eco Innovation Park. Business occupiers will benefit from and will have to meet high environmental standards. Impacts could be during construction and operations phase such noise, air quality, soil quality, biodiversity.

(remains blank if none identified)

PERTH & KINROSS COUNCIL

FINANCE & RESOURCES COMMITTEE

12 June 2024

**REQUEST TO DRAW DOWN EARLY LEARNING AND CHILDCARE RESERVE
FOR SUPPORT IN PRIMARY 1**

**Contact Officer: Sheena Devlin, Strategic Lead – Education and Learning
(Report No. 24/185)**

1. PURPOSE

- 1.1 This report provides details of the increased support required in Primary 1 and outlines the purpose of drawing down funding from the Early Learning and Childcare reserve to meet this level of need.

2. RECOMMENDATIONS

The Committee is requested to:

- A. note the contents of the report.
- B. approve the draw down of Early Learning and Childcare (ELC) reserves of £393,000 in financial year 2024/25 and £243,000 in financial year 2025/26 to provide additional support in P1 For session 2024/25

3. STRUCTURE

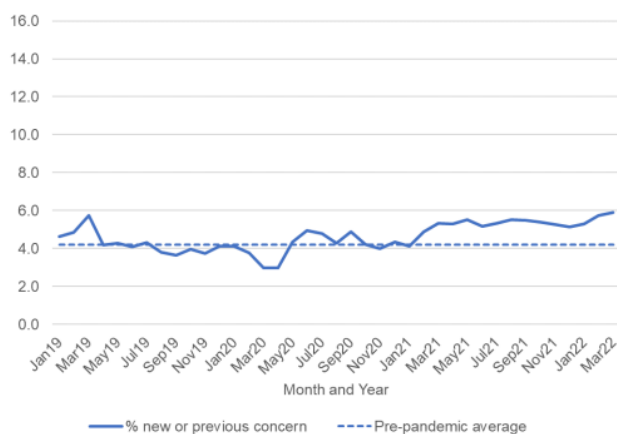
Section 4 Background
Section 5 Main content
Section 6 Conclusions

4. BACKGROUND

- 4.1 In the previous three school sessions, additional support has been given to primary one classes to assist teachers to meet the needs of young children following the impact on expected development as a result of the disruption caused by the Covid-19 pandemic, as well as to embed different approaches to learning and teaching within the classroom provision. Funding from the ELC Reserves Fund was approved previously to cover the costs of this additional support but was not required to be drawn down due to underspends in year. However, a different enhanced support package is now required to meet the increasing challenges of supporting more children with more complex additional support needs as well as children living in communities with the highest levels of deprivation (who we know were most negatively impacted by the pandemic).

4.2 The following graphs provide data gathered by Public Health Scotland from all health boards which shows the percentage of 13-15 month and 27–30 month child health reviews with recorded Speech, Language and Communication developmental concerns by month of review, January 2019 to March 2022.

Figure 1a: Percentage of 13–15-month child health reviews with recorded SLC developmental concerns by month of review, January 2019 to March 2022¹



Source: PHS COVID-19 wider impacts dashboard.

Figure 1b: Percentage of 27–30-month child health reviews with recorded SLC developmental concerns by month of review, January 2019 to March 2022¹



Source: PHS COVID-19 wider impacts dashboard.

5. MAIN CONTENT

5.1 School placement applications concluded at the end of April and of the cohort due to enter primary one (1,293) in August 2024/25, 36% (476) are categorised as Acorn 4 (financially stretched) and Acorn 5 (urban adversity). It is estimated that almost 200 children are entering school disadvantaged in terms of their development and progress towards expected levels of achievement across Early Level in Curriculum for Excellence terms.

5.2 Within Perth and Kinross Council ELC settings and schools, the numbers of children and young people with additional support needs have increased over recent years. At the time of the 2023 Pupil Census, almost 35% of all children and young people in schools had an additional support need, and ongoing monitoring over the course of the 2023/24 session indicates that this may be increasing. Between 2016 and 2023 there were significant increases in the number of children/young people with autism (21 to 31 children per 1000 pupils), communication support (7 to 22 children per 1000 pupils), mental health concerns (16 to 20 children per 1000 pupils) and family issues (33 to 42 children per 1000 pupils). Social, emotional or behavioural needs remains the most frequently recorded reason for support, (103 children per 1000 pupils).

5.3 There has also been a noticeable increase in the number of children with more complex additional support needs (ASN) accessing their 1140 hours of funded ELC within local authority settings and transitioning into mainstream primary one classes. To support primary one teachers to meet the increased needs in session 2023/2024, Education & Learning's Inclusion Team funded

the additionality of one Pupil Support Assistant (PSA) in schools with a higher identified level of need, and in addition there was some support from provided from the Outreach Team.

- 5.4 For session 2024/25, 44 children with more complex ASN were referred to the Perth and Kinross Council Education & Learning Transition Panel for consideration for placement in a special education setting or additional, specific support in a mainstream setting. Of these referrals, 19 have been allocated a place in an intensive support provision; 21 children will access their primary one education within mainstream primary school classes with specific additional support and 4 will be staying on in ELC for an additional year. The 13 schools which will provide education and support to these (21) children with a significant level of need have been identified and their current staffing within primary one assessed.
- 5.5 The Strategic Lead for Education & Learning, in discussion with the Service Managers of Early Years and Childcare, Primary Education, and Inclusion within Perth and Kinross Council have given consideration as to how to best support these primary one class teachers to meet the diverse range of needs in session 2024/25 to support all children entering into primary one appropriately. These discussions were enhanced and informed by feedback from staff in schools where the previous model of additional support in primary one has been in place during the current school session. A range of data was also reviewed to evaluate the efficacy of the model that was put in place. Exclusions and incidences of distressed, challenging, violent and aggressive behaviour remained as causes of concern despite the additional support.
- 5.6 The approach which has been developed is a multi-disciplinary one which will include the primary one teacher, a qualified Early Years Practitioner (ECP), and a full day Play Assistant. This team approach will be allocated to provide enhanced support each day. It is expected that the benefits of this approach will allow the team to:
- meet the diverse range of needs of all the children in the class.
 - provide some flexibility to support children with complex ASNs in a way that meets their individual context.
 - work in ratios that are aligned to children accessing ELC which allows for further targeting of support approaches.
 - provide experiences and spaces that support inclusion through a robust learning-through play approach well supported by a qualified ECP.
 - provide an enhanced offer that goes beyond providing some additionality as in previous years and which supports high quality experiences and learning for all children.
- 5.7 The staff working within this “team around the class” will also access specific training opportunities which will support them in their role. Additional support remains available through the core and exceptional allocation of PSA time to schools in accordance with identified additional support needs across the school.

- 5.8 This different model of support will be developed by temporary extension of existing contracts and redirecting current temporary provision. No additional permanent posts will be created.
- 5.9 Since 2017, the Scottish Government has provided funding through a ringfenced grant for the expansion of ELC hours from 600 hours to 1,140 hours per academic session. The Scottish Government have allowed for flexibility in using the funding to mitigate the impact of the pandemic on children. The primary one intake for August 2024 is the last cohort of children who are most likely to have significant developmental issues as a result of limited opportunities of interaction with wider groups of children, young people and adults caused by the restrictions of the pandemic.
- 5.10 As of March 2024, the ELC reserve is £6.169m. The monies in this reserve can only be used for their stated purpose i.e. to support children and young people in the context of early learning and childcare. This reserve includes monies that could contribute to the costs of any replacement/alternative for City of Perth Early Childhood Centre (COPECC) should that be considered as required as part of the future Corporate Estate. Options for this will be worked up for consideration and a decision by members in due course.
- 5.11 Funding required for full academic year 2024/25 is outlined in table below.

	No of Posts	Fte	Funding
Deprivation allocation	19	11.25	£383,000
Enhanced Support	14	9.58	£253,000
Total	33	20.83	£636,000

The above additional FTE equates to 750 hours of additional support.

Details of posts are contained in Appendix 1.

ACTION: The Committee is asked to approve the transfer of **£393,000** from ELC reserve to Education and Learning in financial year 2024/25 **and** **£243,000** in financial year 25/26.

6. CONCLUSION

- 6.1 This funding is required to meet our PKC vision that children and young people grow up safe, respected, well-educated and confident in their ability to realise their full potential and will support our priorities in relation to enabling our children and young people to achieve their full potential and protecting and caring for our most vulnerable people. The impact of this additional support will be closely monitored and evaluated throughout the session 2024/2025 using pupil progress records, staff and parental feedback as well as all data collected as part of Education and Learning ongoing processes such as levels of Distressed, Challenging, Violence and Aggression (DCVA) and levels of exclusion.

6.2 It is not anticipated that the same level of need will manifest in the following year and such do not consider that the same approach will be required at that time.

Children known to Early Years Inclusion Services	Expected P1 entry date	
104	2024	83
	2025	21

6.3 However, it is anticipated that some additional support will be required for next year's primary one classes as they move in primary two but that cannot be quantified at this stage. This support will be met from existing budgets within Education and Learning Services.

APPROVED

Name	Designation	Date
Sheena Devlin	Strategic Lead – Education & Learning	27.05.24

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You can also send us a text message on 07824 498145.

All Council Services can offer a telephone translation facility.

1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	None
Corporate Plan	Yes
Resource Implications	
Financial	Yes
Workforce	Yes
Asset Management (land, property, IST)	Yes
Assessments	
Equality Impact Assessment	Yes
Strategic Environmental Assessment	Yes
Sustainability (community, economic, environmental)	Yes
Legal and Governance	None
Risk	None
Consultation	
Internal	Yes
External	None
Communication	
Communications Plan	None

1. Strategic Implications

Corporate Plan

1.1 The Council's Corporate Plan 2022 – 2027 lays out seven outcome focussed strategic objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:

- Tackling poverty
- Enabling our children and young people to achieve their full potential
- Protecting and caring for our most vulnerable people

1.2 This report relates to the following these objectives.

- Enabling our children and young people to achieve their full potential
- 10. Protecting and caring for our most vulnerable people

2. Resource Implications

Financial

2.1 There are no direct financial implications arising from this report other than those reported within the body of the main report.

Workforce

- 2.2 There are no direct workforce implications arising from this report other than those reported within the body of the main report.

Asset Management (land, property, IT)

- 2.3 There are no direct asset management implications arising from this report other than those reported within the body of the main report.

3. Assessments

Equality Impact Assessment

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.
- 3.2 The information contained within this report has been considered under the Corporate Equalities Impact Assessment process (EqIA) and has been assessed as **not relevant** for the purposes of EqIA.

Strategic Environmental Assessment

- 3.3 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.4 The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

Sustainability

- 3.5 Under the provisions of the Local Government in Scotland Act 2003 the Council must discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act, the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions.
- 3.6 The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

4. Consultation

Internal

- 4.1 The Senior Leadership Team were consulted in the preparation of this report.

2. BACKGROUND PAPERS

- 2.1 No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

Appendix 1 – Details of Allocations

	No of schools with allocation	Hours per post	Post Title	Cost per post	Projected costs adjusted for 5% slippage
Deprivation	8	30	Early Years Practitioner	£29,863	£226,959
Deprivation	11	15	Early Years Practitioner	£14,932	£156,034
Enhanced support	1	15	Early Years Practitioner	£14,932	£14,185
Enhanced support	11	27.5	Early Years Play Assistant	£20,962	£219,053
Enhanced support	2	13.75	Early Years Play Assistant	£10,481	£19,914
Total cost					£636,145

